

Whether you contributed last year or are a first-time donor, here is what you need to know to complete the donation process.

If you have not activated an account with the Illinois Department of Revenue, you need to:

- 1. Request Letter ID
- 2. Activate Your Account
- 3. Reserve Your Credit
- 4. Make Your Donation

If you have activated an account with the Illinois Department of Revenue, you can skip to page 4.

# REQUEST LETTER ID

- Log on to mytax.illinois.gov.
  - If you already have an account, enter your username and password to verify.
  - If you do NOT have an account, scroll down to the 'Individuals' box on the left.
- **02.** Click on 'Request a Letter ID.'
- **03.** Enter your Social Security Number and one of the following:
  - IL-PIN
  - Most Recent Adjusted Gross Income
  - IL Driver's License Number
  - IL State Identification Number
- **04.** Click 'Submit' and enter and confirm your email address; then click 'OK' to submit and receive your confirmation.
- **05.** Your Letter ID will be mailed to the address on your last year's tax return. You should receive it within 7-10 business days.









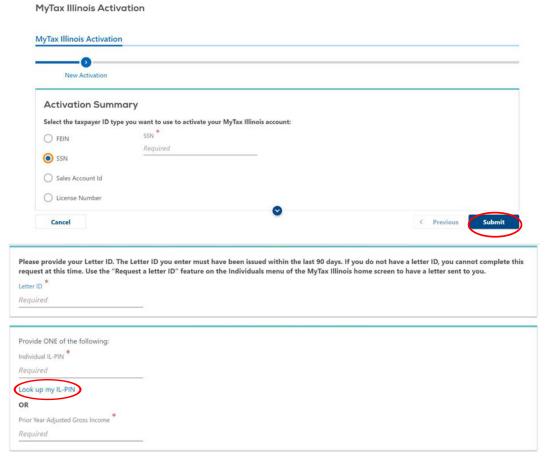
# AFTER YOU HAVE RECEIVED YOUR LETTER ID

# **ACTIVATE YOUR ACCOUNT**

**06.** Log on to mytaxillinois.gov and click 'Sign Up.'

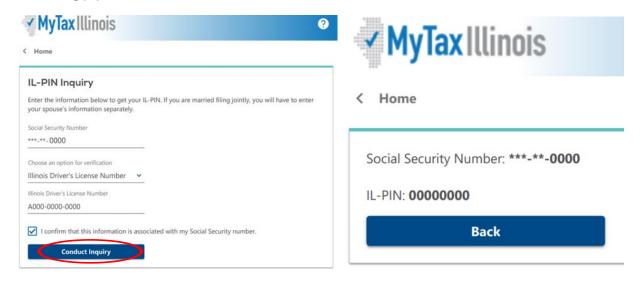


- 7. Select SSN, enter your Social Security Number and click submit; then click 'Yes' to begin activating your account.
  - Enter your Letter ID and either your Individual IL Pin or your most recent Adjusted Gross Income (AGI). If you choose your IL PIN, click on 'Look Up My IL PIN' and go to Step 8. If you choose your most recent AGI, go directly to Step 9.

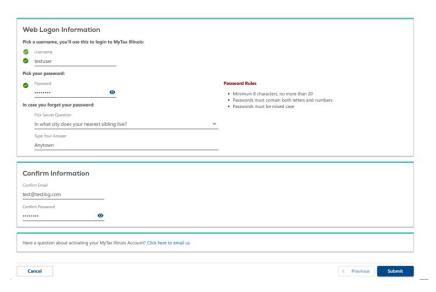


#### 08. If you choose to look up your Individual IL PIN click on 'Look Up My IL PIN.'

- Enter your SSN and either your IL Driver's License or your most recent
- Adjusted Gross Income Click 'Conduct Inquiry'
- Copy your IL PIN and then click 'Back'



- **09.** Enter your Letter ID and your IL PIN. When the screen expands, enter:
  - Your contact information
  - A username and password
  - A security question and answer



10. Click 'OK' on the next screen. You will receive email confirmation that your account was activated. Email Rev.MyTaxHelp@Illinois.gov with questions.





# RESERVE YOUR CREDIT

Only donors who have activated an account with the Illinois Department of Revenue will be able to reserve a Tax Credit. If you have a Username from a previous year, log in using that Username and Password. If you cannot access your account, contact IDOR at 800-732-8866 to resolve this issue. If this is your first time logging into your account after creating it, you will need to enter the Activation Code you received from IDOR after your account was created.

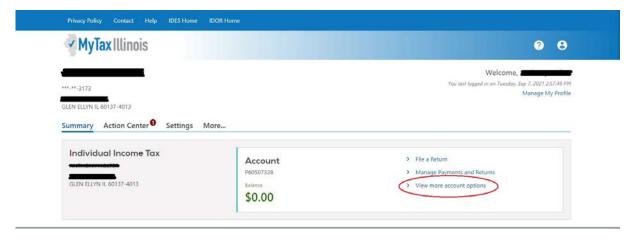
Please make sure the name on your CAC matches the name on the bank or investment account from which the donation is being drawn. As a reminder, under the Invest in Kids Act, corporate donors are not permitted to designate tax credit scholarship donations.

### 11. Visit mytax.illinois.gov

**12.** If you have not already, set up two-step verification for your account. Add your email address and enter the security code sent to you.



- 13. Once logged in, you will be taken to your home screen.
  - Click "view more account options."
  - Please note if you are applying as a business, you will need to use a business account instead of an individual account.

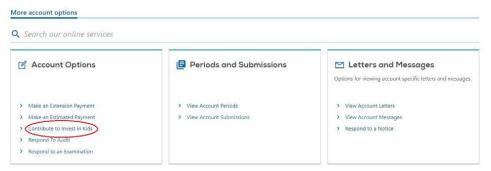




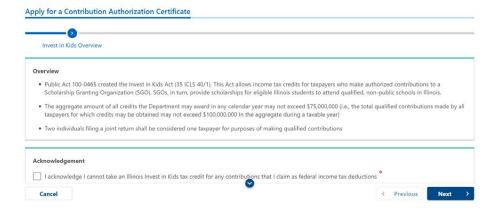




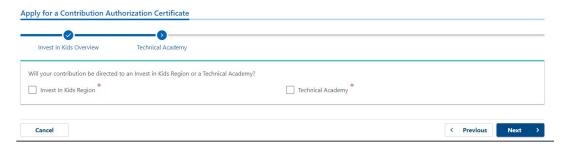
- 14. Under the "Account Options" section, click on "Contribute to Invest in Kids."
  - This will take you directly to the credit



- 15. The first screen of the application is an overview of the program.
  - It asks you to acknowledge that you are not permitted to take state tax credit for any contributions that you claim as a federal deduction.
  - Click the white and blue box to indicate you understand the restriction. Click the blue "Next" button in the bottom right corner.



- 16. Confirm your donation will be contributed to an Invest in Kids Region
  - Check "Invest in Kids Region" and click the blue "Next" button in the bottom right corner.



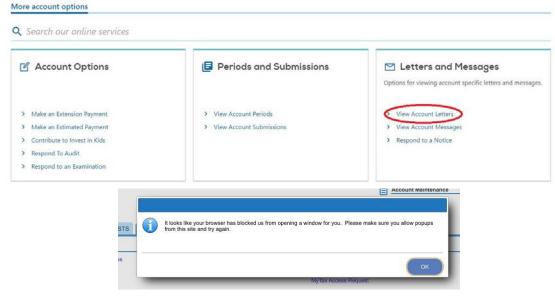
# 17. Fill out the requested information on the "Contribution" screen.

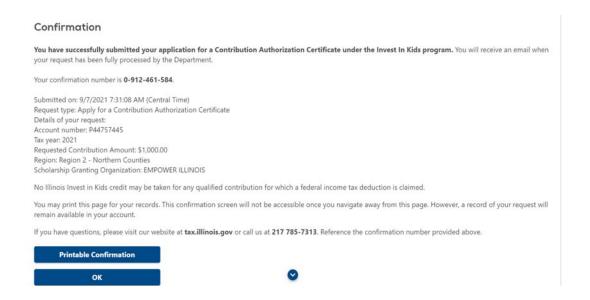
- Region and Scholarship Granting Organization of choice and the amount you plan to donate (contribution pledge).
- Please Note: this is the **TOTAL** amount you plan to donate in that region. You will then get a tax credit valued at 75 percent of that donation. Once filled out, click "Submit." You will then be prompted to re- enter your MyTax Illinois account password and click "OK." The final screen will be a confirmation that your application has been accepted.



#### 18. Access Your Contribution Letter.

- On your mytaxillinois home page, click "View More Account Options." Then click
- "View Account Letters" (picture 1).
- Under "Letters" you will see your "Invest in Kids Contribution Application." This is your
  CAC. Click on the link to open a PDF of your letter.
- Please download and save the PDF, as you will need it for Step 24.
- If you have a pop-up blocker turned on, you may receive an error message. (Picture 2) Make sure you allow pop-ups for the mytaxillinois website.

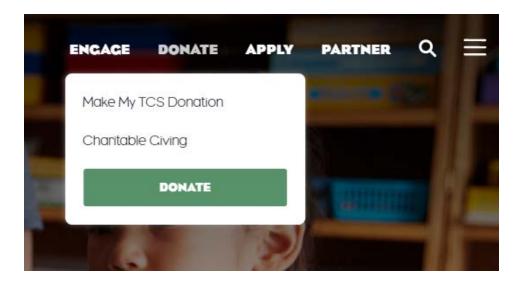




# **MAKE YOUR DONATION**

### 20. Visit Empowerlllinois.org

• On the donate dropdown menu, click the donate button.



For more information or questions, please call (800) 616-7606 or email donors@empowerillinois.org.



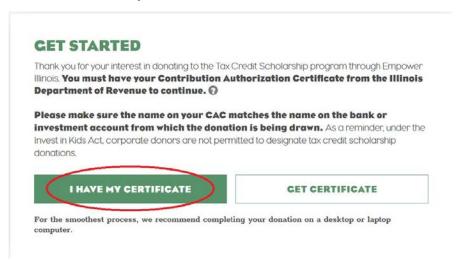




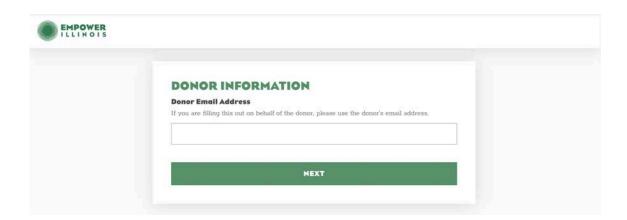


## 21. Start your donation.

- You will be redirected to Empower Illinois' donation wizard, which will walk you through the next steps.
- First, make sure you have your Contribution Authorization Certificate (see this example), and click "I Have My Certificate."



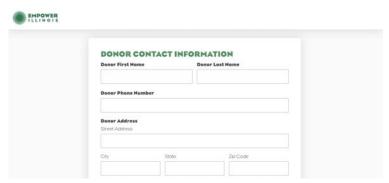
#### 22. Enter the donor's email address.



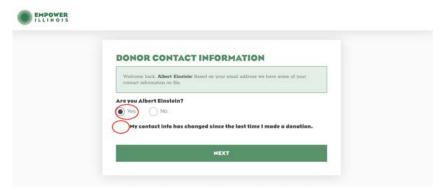


#### 23. Confirm or enter contact information.

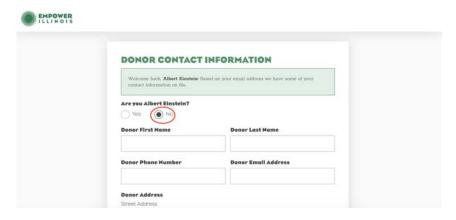
If you are a new donor, or if we do not have a record of the email address you entered, you will be prompted to fill out a contact form.



- If you are a returning donor, we may have your email address and some other contact information on file. Please confirm you are the donor associated with the email you entered by selecting "Yes."
- If your contact information (phone number, address, etc.) has not changed since the last time you donated, leave the box unchecked and click "Next."



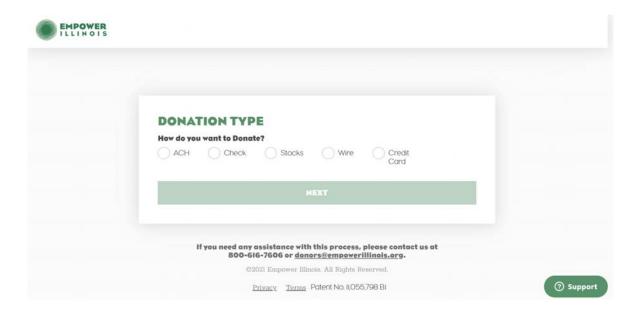
• If we have an incorrect donor on file associated with the email you entered, please select "No," and fill out the contact form.





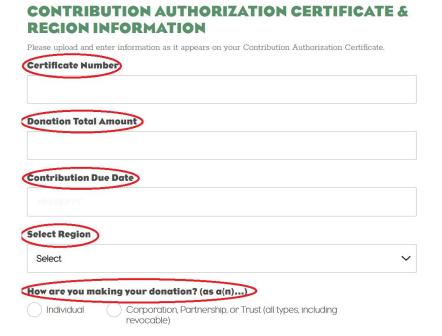


• Please indicate whether you would like to donate by ACH, Check, Stock, Wire, or Credit Card, and click "Next."



### 25. Enter the information found on your Contribution Authorization Certificate (CAC).

- Fill in the certificate number, donation amount, contribution due date (expiration date), and region found on your CAC.
- Indicate your donation type (individual or corporation/partnership/trust).

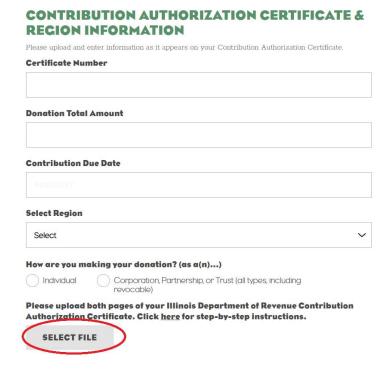




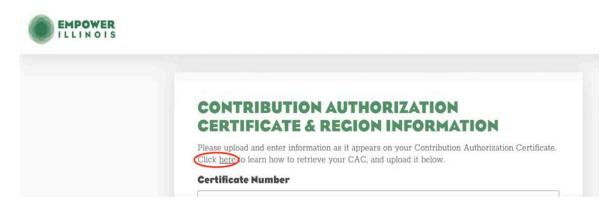


### **26.** Upload your CAC.

- Upload both pages of your CAC. As a reminder, this is the electronic PDF file you received from the Illinois Department of Revenue.
- Once you see the option to "Preview Your CAC," you have successfully uploaded your document.



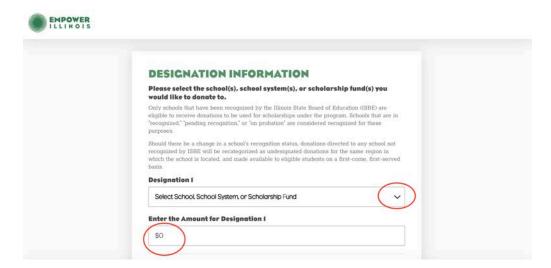
If you need help finding your CAC on mytaxillinois.gov and uploading it to the donor wizard, view our step-by-step guide.



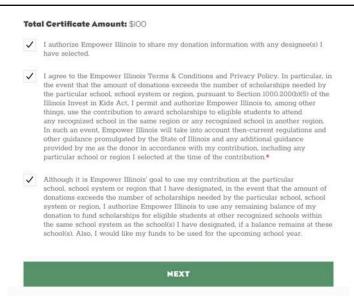


#### 27. Select school designation and donation amount.

- You can designate to a school or school system at any dollar amount, as long it does not exceed the amount listed on your CAC.
- If your gift is greater than \$1,000, you can designate to multiple schools.
- Click the "+" next to "Select another school, school system, or scholarship fund" in the middle of the page to designate to more than one school.



#### 28. Review donor authorizations.



Please select your donation type below to view the last few steps of the donation process:

ACH CHECK STOCKS AND BONDS WIRE 'CREDIT CARDS





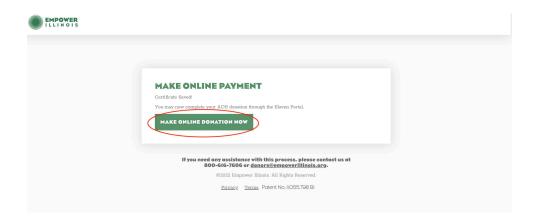




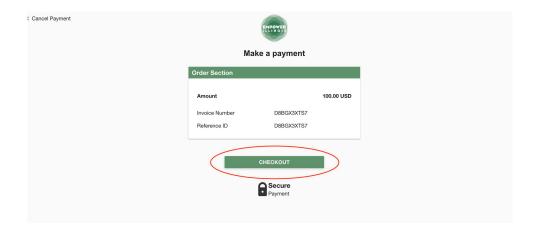
## **DONATE BY ACH**

#### 29. Make online donation.

Once your CAC and designation forms have been saved, you can complete your donation through ACH bank transfer.

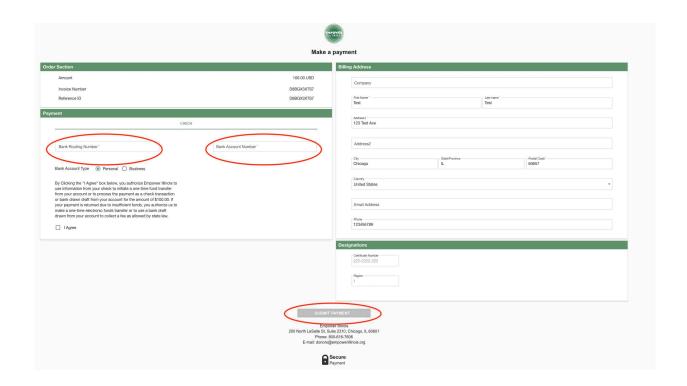


**30.** Click "Checkout" to enter the hosted payment page.





31. Enter payment and contact information (if not pre-populated) and click "Submit Payment."





### **DONATE BY CHECK**

#### 29. Mail your check to Empower Illinois.

- Because you have uploaded your CAC and designation form into the donor wizard, you will need to mail your check (made out to Empower Illinois) to PO Box 8234, Carol Stream, IL 60197-8234. Please include your CAC number on the back of your check.
- You do not need to print out this page and send it in with your check.
- Your donation has also been assigned a confirmation number. This number is for your reference and assures that we have received your CAC and designation form. This number does not confirm we have received your donation.

### **DONATION NEXT STEPS - CHECK**

Thank you for beginning your donation to the Tax Credit Scholarship Program through Empower Illinois. Your confirmation number is DTyNAmqDRr. Please follow the instructions below to complete your donation. These instructions have also been emailed to you.

We have received your Certificate of Authorization (CAC) and Invest in Kids Tax Credit Scholarship Donation Form. In order to complete the donation, you must send in your check made payable to Empower Illinois. Please make sure the amount on your check matches the donation amount you provided to us during this process, and include your CAC number on the back. Checks and overnight packages can be mailed to:

Empower Illinois PO Box #8234 Carol Stream, IL 60197-8234

As a reminder, you must send in your check in order for us to finish processing your donation. We cannot issue you a Certificate of Receipt until the funds are received. You will receive a thank you letter from Empower Illinois when your donation is complete.





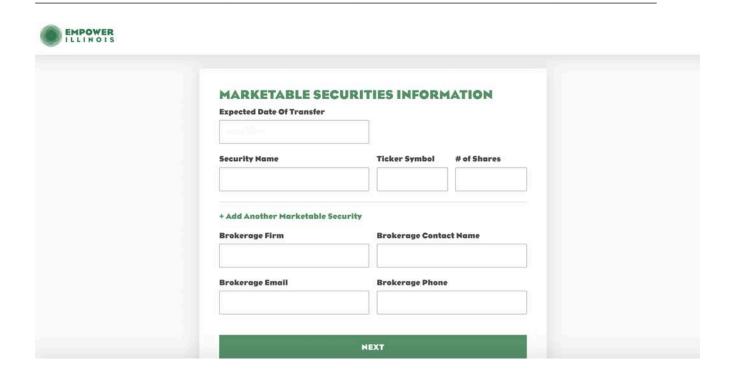






#### **DONATE USING STOCKS AND BONDS**

29. Complete your banking information.



#### **30.** Notify Wintrust Bank of share transfer initiation.

- We ask that you or your broker immediately notify Wintrust Bank at support@wintrustwealth.com or 800-445-2233 upon transfer initiation of any shares (ACATS or otherwise). Please include your name (as the donor) and the shares you are transferring in the comments section of the delivery notice. This will help expedite the donation process.
- Please note that your donation has been assigned a confirmation number. This number is for your reference and assures that we have received your CAC and designation form. This number does not confirm we have received your donation.



# **DONATION NEXT STEPS - MARKETABLE SECURITIES**

Thank you for beginning your donation to the Tax Credit Scholarship Program through Empower Illinois. Your confirmation number is DTuRhhg3SW. Please follow the instructions below to complete your donation. These instructions have also been emailed to you. We have received your Certificate of Authorization (CAC) and Invest in Kids Tax Credit Scholarship Designation Form.

Please use the following instructions to make your marketable securities donation payment to Empower Illinois:

Account Name: Empower Illinois Account Number: 4050-7729

To deposit any DTC-eligible security into a Wintrust Bank Trust account:

Including not limited to Equities, Corporate and Municipal Bonds, Commercial Paper, Medium-Term Instruct current custodian to deliver to:

The Depository Trust Company Participant Account 0141 For credit to account name and number referenced above

Wintrust Bank is ACATS eligible, with participant number 0141. We ask that you or your broker notify

Wintrust Bank at support@wintrustwealth.com or 800-445-2233 immediately upon the transfer initiation of any shares (ACATS or otherwise). Please include your name (as the donor) and the shares you are transferring in the comments section of the delivery notice. This will help expedite the donation process.

To deposit any Fed-eligible security:

Including all Fed-eligible Bonds, Bills, Notes, and agencies, including GNMAs Instruct current custodian to deliver to: Federal Reserve Bank of Cleveland

For: Bank of NYC/FCCORP ABA 021000018 1050/TRUST For Account Number: 4050-7729

Ask your broker or bank to include your name (as the donor) in the comments section of the delivery

If you need any assistance with this process or have questions about making a donation payment, please call 800-616-7606 or email donors@empowerillinois.org. A member of our staff will reach out to confirm when the stock has settled.

As a reminder, you must send us your marketable securities in order for us to finish processing your donation. We cannot issue you a Certificate of Receipt until the funds are received and have settled. You will receive a thank you letter from Empower Illinois when your donation is complete.





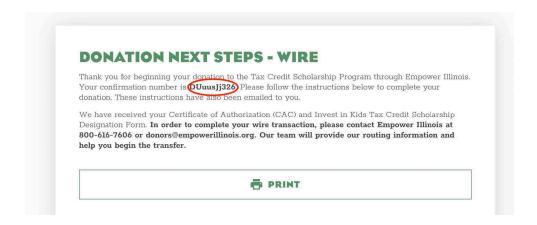




### **DONATE USING WIRE TRANSFER**

# 29. Contact Empower Illinois and begin transfer.

- In order to complete your wire transaction, please contact Empower Illinois at 800-616-7606 or donors@empowerillinois.org. Our team will provide the routing information to begin the transfer.
- Your donation has been assigned a confirmation number. This number is for your reference and assures that we have received your CAC and designation form. This number does not confirm we have received your donation.

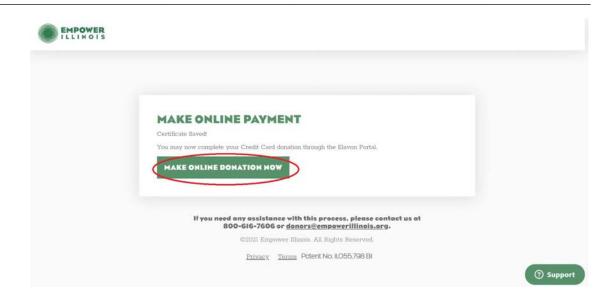






## **DONATE USING CREDIT CARD**

#### 29. Make online donation.



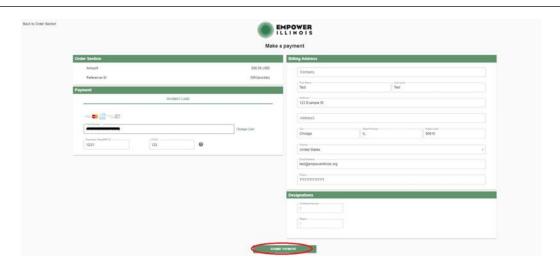
**30.** Click "Checkout" to enter the hosted payment page.







31. Enter your credit card information and click "Submit Payment."



32. Agree to the Terms and Conditions by checking the box and click "Submit Payment" again.

