

GO Private School Tax Credit Scholarship Fund

Form for Transfer of Securities

Follow these steps to contribute appreciated securities to the **GO Private School Tax Credit Scholarship Fund** and gain another tax benefit—the avoidance of capital gains taxes.



1. Submit a contribution commitment online or by completing a paper contribution form
2. Initiate the transfer of the Securities
3. Complete and send this form by mail to:
GO for Private Schools
PO Box 52820
Tulsa, OK 74152

Transferor Information:

Name: _____

Contributor Type: Personal Business

Address: _____

Phone: _____ Email: _____

Description of Securities:

Company Name: _____ Ticker Symbol: _____

Desired Contribution Amount: \$ _____ Number of Shares: _____

Account Details:

<u>Initiating Account Information</u>	<u>Receiving Account Information</u>
Firm Name: _____	Firm Name: Pershing LLC
Contact: _____	DTC: 0443
Transfer Date: _____	Account: TNC-040689
	Account Name: GO for Private Schools

Contributors Get Valuable Tax Credits

- You earn a **state income tax credit** worth up to 75% of the amount you contribute, which directly reduces your Oklahoma income taxes on a dollar-for-dollar basis.
 - Individual taxpayers can earn up to \$1,000 in tax credits annually.
 - Married couples can earn up to \$2,000 in tax credits annually.
 - Business entities (including partnerships, corporations and limited liability companies) can earn up to \$100,000 in tax credits annually.
- You may also claim a **tax deduction** for your contribution that lowers your taxes even further.

** Consult your personal financial or tax advisor for specific tax advice.*

Private Schools and Students Get Funds for Scholarships