

**Donor experience**



# Apogee online submission form

<https://www.apogeebase.com/donate>



## DONATIONS


I am a  New Donor  Repeat Donor

Filing Type

### Maximum Donation Amount :

Individual: \$2,500    Separate: \$2,500    Joint: \$5,000    Pass-Through: \$25,000  
C-Corp/Trust/S-Corp Tax election: 75% of GA tax liability

# Example of an individual tax filer view



**DONATIONS**

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**Donor**  
First Name MI Last Name Suffix SSN

**Spouse**  
First Name MI Last Name Suffix SSN or Tax ID

**Contact Information**  
Address Line 1 Phone Number  
Email  
City State ZIP

**Comment**

Select Tax Year You are Applying For:  
2023

**Donation**  
School Amount  
Please select your school Total  
Add more donations

If your school of choice is not on the list, please select "School not Found" and write in the Comment box the name of the school you wish to support.

Submit

# What the donor sees upon completion of the online submission form

Submission Complete

[Print Receipt](#)

[Record Another Donation](#)



## Early application submission receipt

|                      |  |                |                               |
|----------------------|--|----------------|-------------------------------|
| <b>Donor ID</b>      | 24848                                    | <b>Email</b>   | jpanessa@yahoo.com            |
| <b>Donor Name</b>    | Test Test2                               | <b>Phone</b>   | (404) 040-4040                |
| <b>Filing Type</b>   | Pass-Through 6% Taxable Income: \$100.00 | <b>Address</b> | 123 Test Rd,                  |
| <b>Donor Status:</b> | Individual                               |                | ,<br>Atlanta,<br>GA,<br>30303 |

### --:Donations:--

| Date                | Tax Year | School      | Confirmation # | Amount |
|---------------------|----------|-------------|----------------|--------|
| 2023-03-27 08:31:14 | 2023     | TEST SCHOOL | 71584          | \$100  |

**Total** \$100

# EMAILS

Donors will receive 2 emails upon completion of this process

Thank you for submitting a 2023 tax credit application for the Apogee Scholarship Fund tax credit program.

Apogee will verify your provided taxpayer information with the DOR for accuracy and will contact you if there are any issues with the data provided.

Apogee will submit your pledge information to the DOR for pre-approval on January 3rd, 2023.

You will receive a 2023 DOR pre-approval letter in mid-January indicating that you have been pre-approved for your requested amount.

The date of approval on the DOR approval letter starts the 60-day payment window clock.

This is an auto-response email sent upon completion of any submission. If you receive this correspondence in regards to a matching gift, receiving this email indicates that your matching gift has been processed and received successfully.

Please do not respond to this email. If you have any questions, please visit [www.apogee123.org](http://www.apogee123.org) or contact Apogee at [scholarships@apogeescholarships.org](mailto:scholarships@apogeescholarships.org)

## Apogee Donation Receipt - Test IND



**scholarships@apogeescholarships.org** <scholarships@apogeescholarships.org>

9:28 AM

To: jpanessa@yahoo.com



Test.pdf  
29.94 KB

Receipt for Test

# 1<sup>st</sup> approval/payment request touch email

Similar emails sent at Day 30, 45 and 60 of payment cycle

## Your 2023 tax credit is approved



donations@apogeescholarships.org <donations@apogeescholarships.org>  
1/7/2023 8:17 AM

To: jpanessa@yahoo.com

When Tuesday, March 7, 2023 7:00 PM - Wednesday, March 8, 2023 10:59 AM [View calendar](#)

Where

[Accept](#) [Tentative](#) [Decline](#)

This meeting could not be found on your calendar.



pay\_dueGmail.ics  
609 bytes

Certificate #: split EM1  
Created on 2023-01-07 01:01:45

**Customer Details**  
Name: IND, Test  
Email: jpanessa@yahoo.com  
Donation Comment Type: Unpaid

| School Name  | DOR approved | Payment due | Donation Amt |
|--------------|--------------|-------------|--------------|
| Unrestricted | 2023-01-07   | 2023-03-08  | \$150.00     |
| Total        |              |             | \$150.00     |



[Pay by : Credit Card](#)



[Pay by : Online Check](#)



[Pay by : Paper Check](#)

Thank you for your participation in the Apogee tax credit scholarship program. We have received notification of your 2023 approval from Georgia Department of Revenue. **Your payment must be made within 60 days of receipt of your DOR approval letter.**

Please note that making your payment via check or online check maximizes the amount

### your school has available for scholarships.

If you are funding your credit as a Pass-through taxpayer, please do so through the Pass-through entity if you are able to maximize your tax benefit. Be sure to include your Certificate number found in your DOR approval letter received in the mail on the check or online payment so Apogee can properly match your payment to your donor record.

It is crucial to fund your tax credit within 60 days of the date of your approval letter. If not paid within the prescribed time period, your credit will expire for 2023. \*If payment has already been recently made, please do not be alarmed. Apogee enters each payment received manually so we ask for a minimum of 48 hours to confirm payments in our database.

If you should have any additional questions, please do not respond to this automated email correspondence. Please visit Apogee at [www.apogee123.org](http://www.apogee123.org) or contact us at [scholarships@apogeescholarships.org](mailto:scholarships@apogeescholarships.org).

Thank you for your support!

# Digital marketing payment collection samples

Emailed to taxpayers who haven't yet funded their approved tax credit around Day 55.



**PAYMENT DEADLINE: MARCH 8TH**

## 2) Payment options:

Mail a check to:  
Apogee Georgia School Choice Scholarship  
P.O. Box 117183  
Atlanta, GA 30368-7183

OR

Make a credit card or online  
check payment via Apogee's  
website [www.apogee123.org](http://www.apogee123.org)

Please note that making your payment via check maximizes the amount your school has available for scholarships. If you are unsure what your approved credit amount is, or if you think payment has been made, please contact us at [scholarships@apogeescholarships.org](mailto:scholarships@apogeescholarships.org).

UNPAID CREDITS WILL BECOME VOID and it will decrease the amount of money available for deserving scholarships to help the school of your choice



**DEADLINE: APRIL 1ST**

## 2) Payment options:

Mail a check to:  
Apogee Georgia School Choice Scholarship  
P.O. Box 117183  
Atlanta, GA 30368-7183

OR

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# Final process completed email

## Apogee Donation Process Complete



donations@apogeescholarships.org <donations@apogeescholarships.org>

3/12/2023 12:08 PM



To: jpanessa@yahoo.com

This is an email to inform you that your payment has been received and deposited and you have completed the process. The tax credit receipt paperwork will be mailed this summer. Thank you for your participation in the program this year. Please contact us with any questions or concerns at [www.apogee123.org](http://www.apogee123.org).





2022 Tax credit receipt

6/22/2022

Dear Sample Name

Certificate # 1234567

On behalf of the Apogee Scholarship Fund, we would like to thank and congratulate you for redirecting your state tax liability to the Apogee Scholarship Fund.

Your funds have been directed to your school of choice to provide scholarships for deserving students. Your support of this program is vital to the development of Georgia's youth through exemplary education.

Please take a moment to review the IT-QEE-SS01 form attached to this letter.

Please note that this credit can only be claimed by electronically filing your GA tax return.

Please find your charitable contribution receipt below:

Amount of Cash Contribution: \$ 1000

Description: Scholarship Fund Contribution - Directed to: Test School

No goods or services were provided by the organization in return for the contribution.

As there will be another \$120 million in tax credits available for 2023 we urge you to consider participating again. The online submission form is now open for the 2023 tax year.

Please contact Apogee with any questions or concerns.

Warmest regards,

*John D Panessa*

John D. Panessa  
Executive Director

*Cadie L. Eure*

Cadie L. Eure  
Director of Operations



3330 Cumberland Blvd, Suite 400  
Atlanta, Georgia 30339  
Phone: (404) 419-7123 or 7127  
Fax: (404) 419-7101

[Scholarships@apogeesholarships.org](mailto:Scholarships@apogeesholarships.org)  
[www.apogee123.org](http://www.apogee123.org)

Please review the enclosed documents for accuracy.  
If any changes are required, please contact Apogee immediately.



0806404011

Georgia Form IT-QEE-SS01 (Last Rev. 07/09/18)

Qualified Education Expense Credit Letter of Confirmation

Georgia Department of Revenue Version 1

Please print your numbers like this in black or blue ink:



This form is the second step in the process of applying for the qualified education expense credit. It should be completed by the student scholarship organization and provided to the taxpayer. This form is used to confirm that the taxpayer made the contribution to the student scholarship organization.

Enter for Student Scholarship Organization:

FISCAL YEAR ENDING

0 6 - 3 0 - 2 0 2 2

FIRST NAME OR NAME OF ENTITY

A P O G E E G E O R G I A

MI

TAXPAYER IDENTIFICATION NUMBER

2 6 2 - 6 9 - 3 5 7 2

DEPARTMENT USE ONLY

LAST NAME OF INDIVIDUAL

S C H O O L C H O I C E

SUFFIX

ADDRESS (NUMBER AND STREET or P.O. BOX)

3 3 3 0 C u m b e r l a n d B l v d S u i t e 4 0 0

CITY

A t l a n t a

STATE

G A

ZIP CODE

3 0 3 3 9 -

CONTACT PERSON

J o h n P a n e s s a

TELEPHONE NUMBER

4 0 4 - 4 1 9 - 7 1 2 3

The Official Code of Georgia Annotated Section 48-7-29.16 establishes an income tax credit for qualified education expenses.

A credit is allowed for the expenditure of funds by the taxpayer to a student scholarship organization, operating pursuant to Chapter 2A of Title 20, which uses the contribution for tuition and fees for a qualified school or program.

This letter of confirmation of donation shall be maintained by the taxpayer and made available upon request by the Commissioner.

Enter for Contributing Taxpayer

FIRST NAME OR NAME OF ENTITY

S a m p l e

MI

TAXPAYER IDENTIFICATION NUMBER

1 2 3 - 4 5 - 6 7 7 8

LAST NAME IF INDIVIDUAL

N a m e

SUFFIX

ADDRESS (NUMBER AND STREET or P.O. BOX)

1 2 3 T e s t D r

CITY

A t l a n t a

STATE

G A

ZIP CODE

3 0 3 0 3 -

DATE OF CONTRIBUTION

0 6 - 2 2 - 2 0 2 2

AMOUNT OF CONTRIBUTION

1,000.00

PREAPPROVED AMOUNT OF CREDIT

1,000.00



0806404021

Georgia Form IT-QEE-SS01 (Last Rev. 07/09/18)

Qualified Education Expense Credit Letter of Confirmation

Georgia Department of Revenue Version 1

C. CERTIFICATION BY STUDENT SCHOLARSHIP ORGANIZATION

The Student Scholarship Organization certifies that all information contained above and attached hereto is true to their best knowledge and belief.

Name of Student Scholarship Organization:

A p o g e e G e o r g i a S c h o o l C h o i c e

By:

*John D Panessa*  
Signature of Authorized Officer

Name of Officer Signing

J o h n D P a n e s s a

Date: 0 6 - 2 2 - 2 0 2 2

Title:

E x e c u t i v e D i r e c t o r

Phone Number: 4 0 4 - 4 1 9 - 7 1 2 3

Tax credit receipt letters mailed in the summertime

# Pledge to Payment Process

