

TAX CREDITS NEEDED TO REACH GOAL: 74

READY TO DO YOUR TAX CREDIT? www.bitly.com/ArchwayTriviumTC

Who wants to celebrate the end of the year with PAJAMAS & POPCORN?

Classrooms that bring in
8 TAX CREDITS between
3/9/2023 and 4/17/2023
will earn this celebration
on 5/23/2023!

 CHECK REAL-TIME PROGRESS

CURRENT CLASSROOM COUNT



bit.ly/ArchwayTriviumTC

**TAX CREDITS are
YOUR TAX DOLLARS!**

GIVE THAT \$\$ TO TRIVIUM!

This is NOT the same as a
charitable donation.

\$200 max single filers/
\$400 max married filing jointly

ASK grandparents, neighbors,
co-workers, any family & friends
with AZ state tax liability!!!

What a fabulous response we have had so far to our “Squires and the P” competition... a chance for each classroom to earn a “[Pajamas and Popcorn](#)” reward for helping us to reach the Tax Credit goal this year! Many families may be unfamiliar with Tax Credits and hence haven’t ever done a Tax Credit.

Many of you may hear the school “asking for money” and automatically tune out what comes next. Some of you may be upset thinking that we have created this incentive that the scholars so desperately want and linked it to a money ask.

If you have entertained questions or concerns about the reason why we would offer up an unprecedented incentive like this, or if you are frustrated because you feel you can’t help your child who so badly wants to reach the classroom goal, please review the FAQs below!! And if you have any further questions not answered here, please contact Annann Hong, Family Giving Officer, at (773) 307-6779 or ahong@archwaytrivium.org. We appreciate your support!!

Tax Credit FAQs

Q: Why is the school asking for more money?

A: Tax Credits are a specific allotment of tax dollars that the State of AZ allows us to solicit from AZ taxpayers. However, we cannot just drop these funds into our general operating accounts. We can only use these tax dollars in very particular ways. At Archway Trivium, we use the money that

comes from Tax Credits specifically and primarily to off-set the cost of field trips, which every scholar typically gets to attend twice per school year. The \$10 out-of-pocket fee you pay for each field trip represents only a small fraction (sometimes only 5-10%) of the actual cost per student to rent the buses and pay the admission fees! This is an incredibly smart way for us to utilize the opportunity we are given to bring in additional funds (i.e. tax dollars) to support the school. We already receive less funding as a charter school. Every additional funding source we can tap is essential, especially when it doesn't cost a taxpayer anything extra to do a Tax Credit!

Q: Why is the school linking such a desirable incentive for the students to a money ask?

A: Asking for your Tax Credits is NOT the same thing as asking for a charitable monetary donation. We know at other times throughout the school year, you are asked to donate money to Community Investment and Holiday Appreciation, for example. Those are charitable gifts you are making that are tax-deductible because you're making them to a 501c3 such as we are. We are a non-profit entity the same as St. Mary's Food Bank or the Salvation Army in that regard. As a charter school, we also qualify as a recipient for the AZ Public School Tax Credit. The Tax Credit is an opportunity for you as an AZ taxpayer to choose to redirect a portion of your tax dollars to Trivium that you would otherwise pay to the state of AZ!! These are YOUR tax dollars. You can either give them to AZ or to Trivium. If you, as the taxpayer, have been empowered to CHOOSE where you can assign \$200 (if you're filing single) or \$400 (if you're married filing jointly), the question we should really be asking is: **Why am I making the choice NOT to give those tax dollars to Trivium?**

Q: I've already filed my 2022 tax return. Can I still help?

A: Yes, you can! You can still do the 2022 AZ Public School Tax Credit through midnight of this year's filing deadline of April 17, 2023. If you already filed your 2022 tax return, you can either 1) file an amendment (which is, granted, more time and work and sometimes money if you pay an accountant); or 2) you can still claim back the Tax Credit when you file your 2023 tax return with AZ. You have up to 5 years to claim back the Credit!!

Q: Is there a minimum or maximum amount I can do?

A: Yes, the cap is \$200 for those filing single and \$400 for those married filing jointly, or up to your AZ tax liability, which is the dollar amount on **LINE 52 of your AZ Form 140**. The minimum should also be whatever dollar figure is on Line 52 of AZ Form 140, as long as it does not exceed the maximum allowable. In other words, if your tax liability is less than \$200/\$400, then assign every dollar you have in AZ tax liability found on Line 52. For example, if Line 52 says \$67 and you're filing single or married, send \$67. If Line 52 says \$294 and you're filing married, send in \$294. Otherwise, if the amount on Line 52 is more than \$200/\$400, then please do a Tax Credit for the maximum amount!

Q: I don't owe the state of AZ any taxes this year. I'm getting a refund. Can I still help?

A: Yes, you can! Eligibility to do a Tax Credit has nothing to do with whether you underpaid your taxes this year (and therefore owe money to the state) or whether you overpaid your taxes this year (and are getting a refund back). If you are getting a refund, doing a \$200/\$400 Tax Credit means that this exact amount will be added to your refund. If you have to pay taxes when you file

your tax return, doing a \$200/\$400 Tax Credit means you can subtract that exact amount from the balance of what you would owe to the state of AZ when you file your tax return. You will “get credit” for the portion of those taxes you owed to the state of AZ but chose to give to Trivium instead. It will make that payment sting just a little bit less hopefully, knowing that you are sending some of your tax dollars directly to Trivium!!

Q: What if I don't have any AZ tax liability (this is really only going to apply for military and clergy that are tax exempt, or perhaps some of our retired grandparents that don't have any taxable income). Can I still help?

A: Yes, you can! Even if you don't have any AZ tax liability to assign to a Tax Credit, make a list of AZ friends and family that you can ask. Are there grandparents or aunts and uncles that live ANYWHERE in the state of AZ that have tax liability? Maybe a friend has children that go to a private school. They can do a Private School Tax Credit and ALSO do a Public School Tax Credit to Trivium. They are not mutually exclusive. You can agree to do a *quid pro quo* with your Tax Credits and “trade.” If you have neighbors with no children or no more school-age children, ask if they will leverage their tax dollars to support Trivium! Often, families may forget after their children graduate that they can still choose to do these Tax Credits to a school. Individuals need to have children attending Trivium to do a Tax Credit to support our school.

Q: I already contributed my 2022 Tax Credit to the school. Can I still help?

A: Yes, you can! Everything in the answer to the previous question applies to this situation, as well! Tap your social network in AZ. Just make the ask, “Have you contributed your AZ Public School Tax Credit to a school yet for 2022? Will you please consider giving your tax dollars to Trivium?”

Q: What if I have more than one child at Archway? How do I submit the Tax Credit so that all their classrooms get credit?

A: No worries! The Classroom Tracker is automatically set up so that when a family with multiple children submits their Tax Credit, every one of your child's classrooms will “get credit.”

Q: What if our classroom gets more than 8 Tax Credits?

A: We will keep doing real-time tracking of Tax Credits at www.bitly.com/pajamasandpopcorn until midnight on the tax filing deadline this year of Monday 4/17/2023. Classrooms that exceed 8 Tax Credits can help other classrooms that haven't done so yet! Don't stop thinking of folks to ask for Tax Credits even if your classroom exceeds the classroom goal!

Q: What if I already did my 2022 Tax Credit and I want to give my 2023 Tax Credit now to count for this classroom incentive? Can I contribute a portion of my 2023 to “count”?

A: We would kindly ask that you not do that. We calculated the classroom goal of 8 by dividing what we had left to reach goal as of March 9th between the 30 classrooms we have. If we receive \$50 Tax Credits trying to get that to count as a Tax Credit, you can see how the math won't allow us to reach goal anymore for this year. Additionally, trying to do an advance on your 2023 Tax Credit means that next year, we will struggle to reach goal if you have already given us even a partial advance. We would really like to focus this competition on 2022 Tax Credits!

Q: What if I have other questions that haven't been answered in this document?

A: So glad you asked! Please contact Annann Hong, Family Giving & Community Engagement Officer, at ahong@archwaytrivium.org or (773) 307-6779 and she will be more than happy to assist. Q&As will also be added to this document as they are asked and deemed as having universal interest to others!

Q: Now it all makes sense. How can I submit my Tax Credit to Trivium & take advantage of this amazing opportunity to support the school with my tax dollars?

A: Just visit www.bitly.com/ArchwayTriviumTC to submit your \$200/\$400, and you will be emailed a receipt immediately thereafter. That receipt will remind you to file Form 322 with your AZ return in order to get credit for paying a portion of your taxes to Trivium. The receipt will give you the CTDS number you need to include on Form 322, along with the date you have submitted the Tax Credit to Trivium! It's that easy!