



Oakdale School Foundation

Donor Agreement for Qualifying Oklahoma Equal Opportunity Education Scholarship Act Contributions

Submitted to OTC:

Date: _____

Pledges Received:

Date: _____

Commitment Complete:

Date: _____

Agreement Date: _____

Tax Year(s): _____

Donor Name: _____ SSN/EIN: _____

Address: _____ Phone: _____

Donor Filing Status: ☐ Single/Married Filing Separately ☐ Married Filing Jointly ☐ Qualified Business Entity

Organization: Oakdale School Foundation

EIN: 73-1275159

Organization Address: 10901 N Sooner Rd, Edmond, OK 73013 Organization Email: OSFOakdale@outlook.com

Purpose: The donor's non-refundable contribution* will be used to support educational services for Oakdale students through grants awarded to Oakdale teachers and staff.

Donation Amount & Frequency:

**Qualifying donations must be at least \$3000 annually.*

The donor will contribute \$_____ annually* for:

☐ 1 Year, which qualifies for a tax credit of up to 50%

☐ 2 Years, which qualifies for a tax credit of up to 75%

Payment schedule: \$_____ Date: _____

\$_____ Date: _____

Deadlines: All contributions must be postmarked on or before December 31. Gifts must be reported to the OTC on January 10, of the following year, to be credited in year donated. **Contributions and this signed agreement should be mailed to:**
[Attention: Kristen Hunt, OSF, 10901 N Sooner Road, Edmond, OK 73013]

Documentation: Oakdale School Foundation will submit required information to the OTC as confirmation of the Donors' eligibility for a tax credit under the Oklahoma Equal Opportunity Education Scholarship Act. Donor must also submit proof of donation to the Oklahoma Tax Commission when claiming the tax credit.

Important Tax Credit Information: *The tax credit has a statewide cap of \$25,000,000 and a district cap of \$200,000 annually. If total credits claimed exceeds either cap, the credit to the taxpayer will be a proportionate share of the cap for the taxable year after allocation of any amount of credits not claimed by other eligible organizations and taxpayers under the Act. Credits earned but not allowed due to the application of the statewide cap will be considered suspended and authorized to be used in the next immediate tax year and applied to the next year's statewide cap. Any credits authorized by the Act allowed but not used in any tax year may be carried over, in order, to each of the three (3) years following the year of qualification.*

Donor agrees to make a financial contribution to the Oakdale School Foundation that qualifies for an Oklahoma Equal Opportunity Education Scholarship Act tax credit based on the terms outlined in this document.

Donor Representative Signature: _____ Date: _____

Organization Representative Signature: _____ Date: _____