



Manual Filing Instructions

Although e-filing is an available option to claim this credit, Apogee understands that many of our donors choose to manually file their GA return. In the event that you are a manual filer, please follow the instructions below:

1. Be sure that you have a copy of your tax credit receipt (Form IT-QEE-SSO1) and a copy of the completed Form IT-QEE-TP2 to include with your GA return. If you do not have this in your possession, please contact Apogee. We will be happy to provide you with another copy.
2. Claim the amount of your contribution as a charitable deduction on your Federal return.
 - Increase your GA income by the amount of your contribution to Apogee as a charitable contribution on your federal return.
3. On Form 500, increase your GA adjusted gross income by the amount of your contribution to Apogee, which was just deducted as a charitable contribution on the federal return (see above). This is to prevent you from “double dipping”.
 - On Form 500, Page 4, Schedule 1, Line 4 under “other”, write QEE Credit and the amount of your contribution to Apogee.
 - The total of Line 12 total should then be listed on Page 2, Line 9 of Form 500.
4. Claim your Qualified Education Expense Credit
 - One Schedule 2 of Form 500, Line 4, Page 5, enter the amount of Qualified Education Expense Credit. If your credit was allocated through the ownership of a business such as an LLC, S-Corporation, or Partnership, please contact Apogee for specific instructions.
 - Complete Line 11 on Page 5
 - Enter total of Line 11, Page 5 on Lin 17 of Page 2

Although Apogee has offered this tax filing guidance, Apogee recommends you secure the advice of a tax professional.

Thank you for your support.

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