

2023 HEART Tax Credit Form

Complete this Form to authorize Georgia HEART to submit your application to the Georgia Department of Revenue for approval and email it to heart@georgiaheart.org

Complete the following fields:

Select Tax Filing Status	Tax Credit Limit
<input type="checkbox"/> Individual Filer	up to \$5,000
<input type="checkbox"/> Married Filing Jointly	up to \$10,000
<input type="checkbox"/> C Corporation, Trust, or Pass-through Entity <i>Electing to pay tax at entity level</i>	up to 75% of GA Tax Liability
<input type="checkbox"/> Individual Owner of S-Corp, LLC, or Partnership (Pass-Through Entity) <i>NOT paying tax at entity level</i>	up to \$10,000

Taxpayer's Name: _____ SSN: _____

Spouse's Name: _____ SSN: _____

Address: _____ Phone: _____

City: _____ State: _____ Zip: _____ E-mail: _____

Contribution Amount: _____ 75% of estimated GA income tax liability: _____
*(for C Corps, Trusts and **Electing Pass-Through Entities**)*

Designated Hospital: _____

Owner of Pass-Through Entity NOT paying tax at the entity level only:

- 1) Who listed above is the pass-through entity owner? _____
- 2) Are you a Single, Married Joint or Married Separate Tax Filer?
- 3) Please list owner's estimated 2023 net income from pass-through ownership: _____
- 4) If a Married Joint Filer, do both spouses have pass-through ownership? Yes No
- 5) If Yes, please list spouse's estimated 2023 net income from pass-through ownership: _____
- 6) Name of Pass-Through Entity _____

Authorization:

I authorize Georgia HEART to submit my 2023 HEART Form to the GA DOR, and I commit to funding my full approved contribution amount within 180 days of DOR approval.

With taxpayer authorization, Georgia HEART will submit this application to DOR for pre-approval on the first business day of January 2023. The DOR has 30 days to provide approval to the taxpayer. Once DOR approval has been received, the taxpayer will have 180 days to submit a check made payable to their designated hospital and sent to Georgia HEART for deposit into the hospital's account.