

# **Steps to Reserve a Tax Credit**

# for the Illinois Gives Tax Credit Program

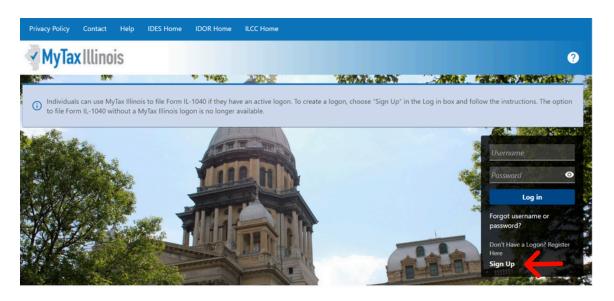
The credits are awarded on a first come, first served basis and donors must have a MyTax Illinois account to reserve credits. Here is what you need to know to complete the donation process.

If you **have not** activated an account on mytax.illinois.gov with the Illinois Department of Revenue, you need to:

- I. Request Letter ID
- **II. Activate Your Account**
- III. Reserve Your Credit with Illinois Department of Revenue (IDOR)
- IV. Make Your Donation with Big Shoulders Fund

If you **have** activated an account with the Illinois Department of Revenue, you can go to step 11 and "Reserve your credit with IDOR". Directions for this start on page 5.

#### I. REQUEST LETTER ID

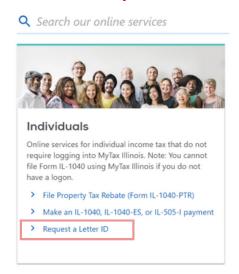


#### 1. Visit mytax. illinois.gov

- If you already have an account, enter your username and password to verify.
- If you do NOT have an account, scroll down to the 'Individuals' box on the left.



#### 2. Click on 'Request a Letter ID.'

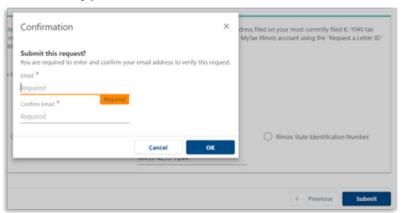


#### 3. Enter your Social Security Number and one of the following:

- IL-PIN
- Most Recent Adjusted Gross Income
- IL Driver's License Number
- IL State Identification Number



4. Click 'Submit' in the bottom right of the screen and enter your email address (two times to confirm no typos); then click 'OK' to submit and receive your confirmation.



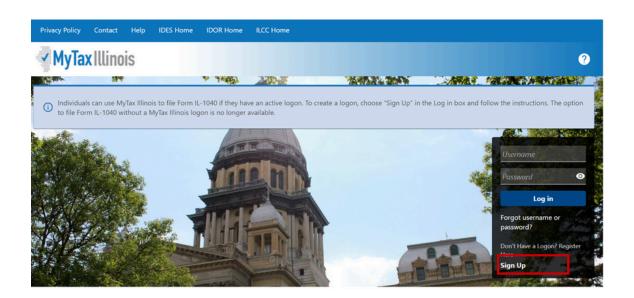


5. Take down your 10-digit confirmation code for your records and wait 7-10 business days for your Letter ID to arrive in the mail. Your Letter ID will be mailed to the address on your last year's tax return.



# II. ACTIVATE YOUR ACCOUNT AFTER YOU HAVE RECEIVED YOUR LETTER ID

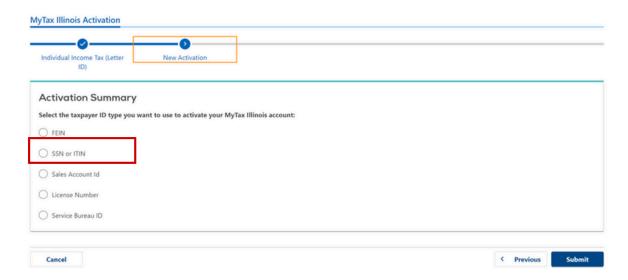
6. When you receive your letter ID in the mail, please Go to mytax.illinois.gov and click 'Sign Up.'





# 7. Select SSN, enter your Social Security Number and click submit; then click 'Yes' to begin activating your account.

- Enter your Letter ID and either your Individual IL Pin or your most recent Adjusted Gross Income (AGI). If you choose your IL PIN, click on 'Look Up My IL PIN' and go to Step 8.
- If you choose your most recent AGI, go directly to Step 9.



# 8. If you choose to look up your Individual IL PIN click on 'Look Up My IL PIN.'

- Enter your SSN and either your IL Driver's License
- Click 'Conduct Inquiry'
- Copy your IL PIN and then click 'Back'

### 9. Enter your Letter ID and your IL PIN.

When the screen expands, enter:

- Your contact information
- A username and password
- A security question and answer

# 10. Click 'OK' on the next screen. You will receive an email confirmation that your account was activated.

• Please email Rev.MyTaxHelp@Illinois.gov with questions.



#### III. RESERVE YOUR CREDIT

Only donors who have activated an account with the Illinois Department of Revenue will be able to reserve a Tax Credit.

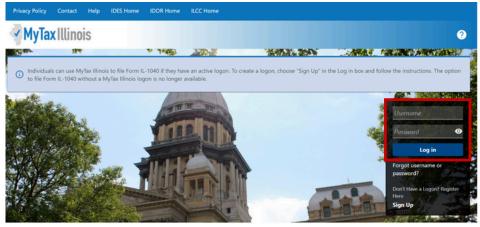
#### **Returning MyTax Illinois Donors:**

- If you have a Username from a previous year, log in using that Username and Password. Please note: you may be sent a pin number to your email associated with the account if you have not signed in recently.
- If you cannot access your account, contact IDOR at 800-732-8866 to resolve this issue.

#### **New MyTax Illinois Donors:**

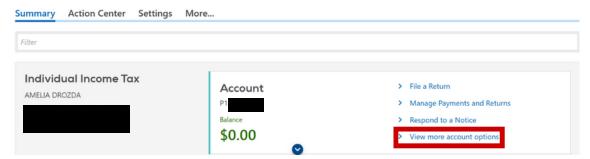
 As this is your first-time logging into your account after creating it, you will need to enter the Activation Code you received from IDOR after your account was created with your email.

#### 11. Go to mytax.illinois.gov, enter username and password, and click 'Log-In.'



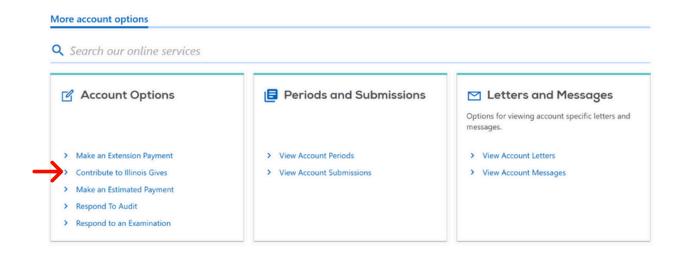
#### 12. Once logged in, you will be taken to your home screen.

Click "view more account options."



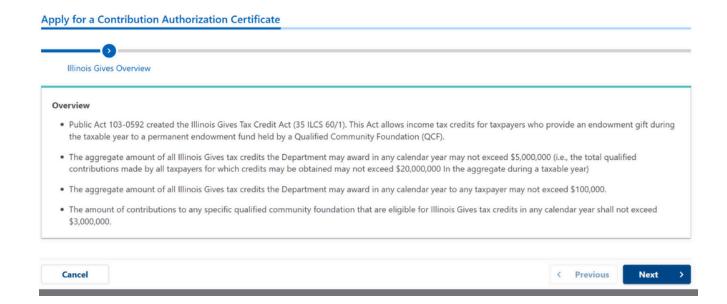


# 13. Under the "Account Options" section on the left-hand side of the screen, click on "Contribute to Illinois Gives."



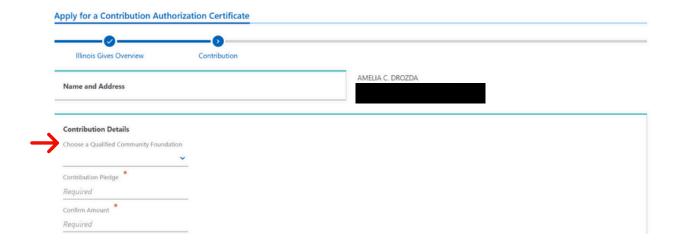
#### 14. The first screen of the application is an overview of the program.

• Click the blue "Next" button in the bottom right corner.





15. Click the dropdown option "Choose a Qualified Community Foundation" under "Contribution Details".



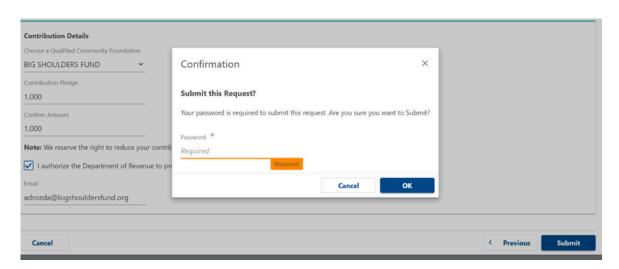
### Choose "Big Shoulders Fund"



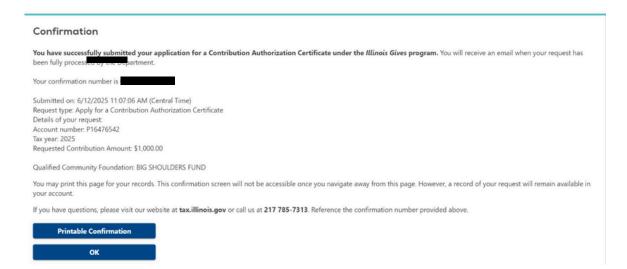


#### 16. Type your Contribution Pledge and confirm the amount.

A pop-up will appear once you have submit to confirm your account password.
Please make sure you have it on hand to move forward.

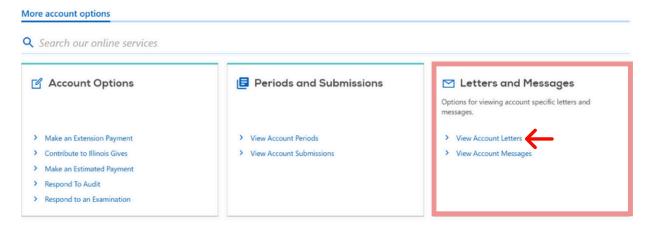


### 17. Save or print the confirmation page for your records.

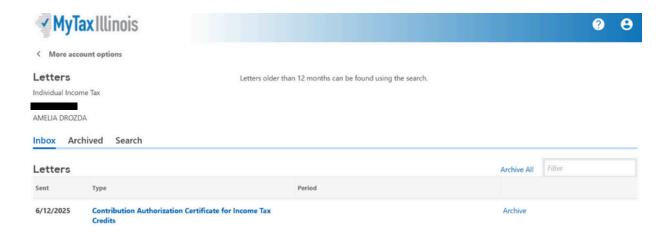




18. Once you have been redirected back to your home screen, click "View Account Letters" under "Letters and Messages" to view your Contribution Authorization Certificate. Contact Big Shoulders Fund if you have trouble locating your documents.



19. Click "Contribution Authorization Certificate for Income Tax Credits" to view your letter.





### Here is an example of what your letter will look like.

# **Contribution Authorization Certificate for Income Tax Credits**



AMELIA C. DROZDA



#### **Contribution Authorization Certificate Application Status**

Your application for a Contribution Authorization Certificate for the Illinois Gives program for tax year 2025 has been approved.

Attached is your Contribution Authorization Certificate. You must provide a copy of this certificate to the Qualified Community Foundation when you make your contribution.

If you have any questions, visit our website at **tax.illinois.gov** or call us weekdays between 8:00 a.m. and 4:30 p.m. at the telephone number below.

PROBLEMS RESOLUTION DIVISION ILLINOIS DEPARTMENT OF REVENUE PO BOX 19014 SPRINGFIELD IL 62794-9014

20. Please send a pdf of the Contribution Authorization Certificate to giving@bigshouldersfund.org or through our <u>online form</u>.



# IV. Make Your Donation with Big Shoulders Fund

# **Steps To Donate**

# **Step 1: Submit Certificate to Big Shoulders Fund**

- Email to giving@bigshouldersfund.org or
- Online form

# **Step 2: Make contribution:**

- Check made out to Big Shoulders Fund:
  - Mail to 212 W Van Buren, Suite 900 Chicago, IL 60607
- Wire Transfer
- Stock Donation
  - Please contact Amy Drozda at adrozda@bigshouldersfund.org for more information on this option.
- Online Secured Credit Card Donation (Click the link to access the donation form)

Big Shoulders Fund will report your contribution to the Illinois Department of Revenue. The formal Certificate of Receipt will be available through your mytax.illinois.gov account. You will also receive an acknowledgement letter from Big Shoulder Fund.

Please contact us with any questions or support needs at:

**Email** giving@bigshouldersfund.org or **Call** 312.751.8337 or

Visit bigshouldersfund.org/il-tax-credit