

Louisiana STO Donation Workflow & How to Claim the Credit

A simple step-by-step guide to donating through a Louisiana School Tuition Organization and claiming the state tax credit

1 Before You Donate



Choose a participating Louisiana STO

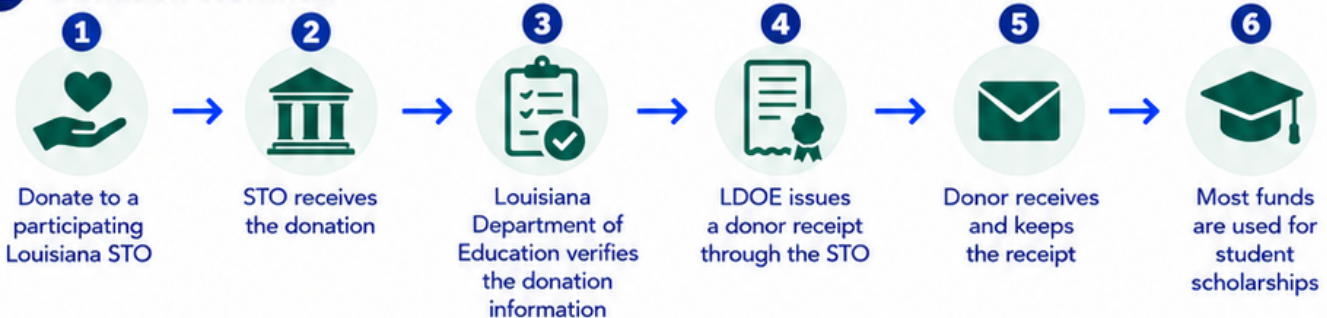


Donor should generally be required to file a Louisiana income tax return



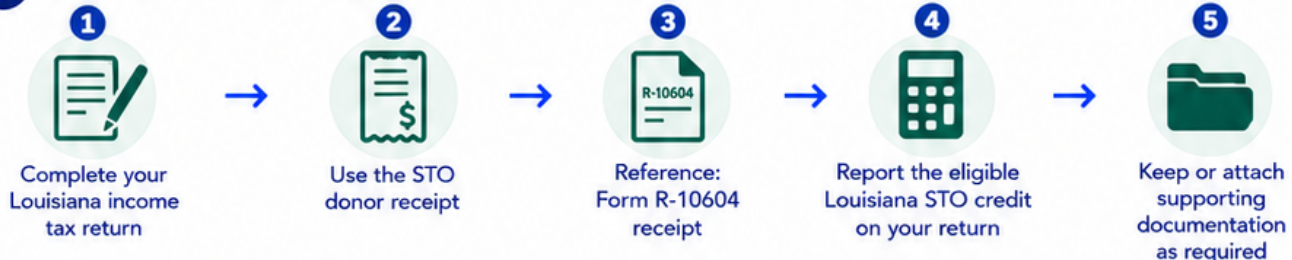
Donations must be monetary

2 Donation Workflow



Louisiana's program is commonly described as providing up to a 95% state income tax credit because most donated funds go to scholarships.

3 How to Claim the Credit



The credit may generally be claimed after the receipt is issued.

4 Important Credit Reminders



Up to 95% Louisiana state income tax credit



Nonrefundable credit



Unused credit may generally carry forward for up to 3 years



Credit is based on the amount used for scholarships

5 Common Mistakes to Avoid



Donating to a non-participating STO



Losing your receipt



Trying to claim the credit before the receipt is issued



Assuming the full donation always equals the full credit

Simple takeaway



Participating Louisiana STO

+



Donation

+



Receipt

+



Correct Louisiana tax filing

=



Potential Louisiana tax credit

Educational infographic only. Tax results depend on Louisiana law and your personal tax situation.