



➤ See instructions.

➤ Attach to Form 720, 720U, PTE, 725, 740, 740-NP, or 741

A Name of Taxpayer		B Federal Identification Number or Social Security Number		C Kentucky Corporation/LLET Account Number (if applicable)	
Street Address or P. O. Box		Telephone			
City		State	ZIP Code	E-mail Contact	
D Type of Entity: <input type="checkbox"/> Individual <input type="checkbox"/> Estate <input type="checkbox"/> Trust <input type="checkbox"/> Corporation <input type="checkbox"/> Limited Liability Pass-through Entity <input type="checkbox"/> General Partnership <input type="checkbox"/> Other _____					
E Date the Endowment Gift was made to the Approved Foundation		F Amount of Endowment Gift		G Date of the Department's Preliminary Authorization of Credit	
____ / ____ / ____ M M D D Y Y				____ / ____ / ____ M M D D Y Y	
H Name of Qualified Community Foundation or Affiliate Community Foundation		I Federal Identification Number		Telephone	
Street Address or P. O. Box				Fax Number	
City		State	ZIP Code		

J If applicable, name of Permanent Endowment Fund or County-Specific Component Fund receiving the gift

Under penalties of perjury, I declare that the Foundation is a qualified community foundation as provided by KRS 147A.310(6); that the endowment gift listed above is held in a permanent endowment as provided by KRS 147A.310(4); and that I have examined this schedule, including all accompanying documents and statements, and to the best of my knowledge and belief, it is true, correct, and complete.

By: _____ Date: _____
Signature of Foundation Officer (or designee)

Print Name: _____ Title: _____

Department of Revenue Use Only	
Endow Kentucky tax credit approved by the Department of Revenue.	
Amount	
By: _____	Date: _____

DRAFT

The process for finalizing the endowment gift after preliminary authorization is received is set forth in 103 KAR 15:195 Section 4. All questions should be directed to: DORTaxCredits@ky.gov.

A taxpayer must attach a copy of the approved Schedule ENDOW to the tax return each year to claim the tax credit against the taxes imposed by KRS 141.020 or 141.040 and 141.0401. The ordering of the credits must be as provided by KRS 141.0205.

A partner, member, or shareholder of a pass-through entity must attach a copy of Schedule K-1, Form PTE to the partner's, member's, or shareholder's tax return each year to claim the tax credit.

A beneficiary of an estate or trust must attach a copy of Schedule K-1, Form 741, to the beneficiary's tax return each year to claim the tax credit.

Submission Instructions

Choose one of the following options to submit the Endow application.

E-mail: DORTaxCredits@ky.gov

Fax: 502-564-0058

Hand-delivery: Department of Revenue, 1st floor security desk at 501 High Street, Frankfort, Kentucky (call 502-564-8139 and ask for an employee in the Tax Credits Section.)

Note: This application contains time-sensitive information; therefore, mailing the application is not recommended.