



Bourgade Catholic High School

COLLEGE PREPARATORY

FINANCIAL AID/SCHOLARSHIP INFORMATION

Arizona State Tax Credit Scholarships

The State of Arizona offers taxpayers a State Tax Credit for contributions made to qualifying School Tuition Organizations (STO's). This unique program may provide families several opportunities for financial assistance through Individual Tax Credit Scholarships, Plus Tax Credit Scholarships, Corporate Tax Credit Scholarships and Disabled Displaced Scholarships. We recommend that each family apply for five to seven STO scholarships each year.

The State of Arizona provides several options to assist families in paying for your child's Catholic education, including the Empower Scholarship Account (ESA) Program and through State Tuition Organization (STO) tax credit funds. These programs are offered through the State and/or through the individual STO, and are not managed by the School.

Therefore, you are responsible for compliance with all terms, conditions to eligibility, and legal requirements related to any programs in which you participate. Please note in particular that pursuant to state law, if you choose to utilize an Empower Scholarship Account, you may not utilize STO funds (or vice versa). The School is not responsible for ensuring your compliance with this or any other term, condition, law or requirement relating to tuition assistance programs.

Furthermore, please be aware that payment of your child's tuition is your responsibility, whether or not you choose to participate in ESA, STO, or any other programs or options to assist your family. These programs may not cover 100% of the cost of tuition and fees, and therefore any outstanding portion will remain your responsibility.

Applying for financial assistance from a School Tuition Organization (STO):

1. A new application for financial assistance from a STO must be made each school year.
2. **FILE YOUR TAXES EARLY (JANUARY OR FEBRUARY)!!**
3. Most of the scholarship applications require a copy of the family federal tax return.
4. If you anticipate filing an extension or filing your tax returns late, submit your prior year tax return and your current year W-2's.
5. **DO NOT DELAY FILING FOR FINANCIAL ASSISTANCE. MOST SCHOLARSHIPS ARE AWARDED ON A FIRST COME, FIRST SERVE BASIS.**
6. Each STO has their own application requirements and deadlines.

Individual Tax Credit Scholarships –

- Sources can include both student recommended funds and general funds.
- **General Fund** eligibility is usually based on need. These funds become available when an individual redirects their taxes to an STO, not recommended to a particular student.
- **Recommended Funds** become available when an individual redirects their taxes to an STO, recommended to your student. There are no income limitations on recommended funds and a student may receive up to 100% of tuition amount.

Plus Tax Credit Scholarships-

- Sources can include both student recommended funds and general funds.
- Eligibility is based on income, previous corporate award receipt, transferring from public school to private or active military status.
- Both General and recommended funds become available through Arizona individual tax redirection.

Corporate Tax Credit Scholarships-

- Sources include General funds only.
- Eligibility is based on income, previous corporate award receipt, transferring from public school to private school or active military status.
- These funds become available through Arizona corporation tax redirection.

Student is eligible for a Corporate tax credit scholarship if they meet the following Income Requirement-

Household Size	Annual Family Gross Income Allowable
2	\$67,492
3	\$85,083
4	\$102,675
5	\$120,267
6	\$137,858
7	\$155,450
8	\$173,042

and one of the following:

- Student attended an Arizona public school as a full-time student for at least 90 days of the prior fiscal year or one full semester and then transferred from the public school to a private school; **OR**
- Is enrolling in a private school kindergarten; **OR**
- Is enrolling in a private preschool program for students with disabilities; **OR**
- Is a dependent of a member of the armed forces of the United States who is stationed in Arizona pursuant to military orders; **OR**
- Received a low-income corporate scholarship (under above criteria) or an original individual scholarship or a switcher individual scholarship in a prior year and the child continued to attend a private school in subsequent years.

Disabled/Displaced Tax Credit Scholarships-

- Sources include General funds only.
- Eligibility is based on meeting ONE of the following prerequisites:
 - o Student has a current or expired MET or IEP from an Arizona public school (for preschool and grades K-12), OR
 - o Student has a current or expired 504 plan from an Arizona public school (for grades K-12 only), OR
 - o Student was placed at one time in the Arizona foster care system (for grades K-12 only and will be verified with the Arizona Department of Economic Security)

These funds become available through Arizona corporation tax redirection.

Contact the Bourgade Catholic Finance Office or the School Tuition Organization for help determining eligibility for the Plus Tax Credit, Corporate Tax Credit Scholarship and Disabled/Displaced Tax Credit Scholarship.

How to obtain *recommended funds*:

The State of Arizona offers taxpayers a State Tax Credit for contributions made to qualifying STO's.

- Donors to these funds can **recommend** that their Arizona State Tax credit dollars be applied toward your student.
- A parent cannot contribute for the benefit of their own child. Many Bourgade Catholic families find donors through family members, business associates and friends.
- In 2022, married taxpayers can recommend up to \$2,483 of their Arizona State Tax dollars and single taxpayers can redirect up to \$1,243 by utilizing the **Individual Tax Credit and Plus Tax Credit** programs!
- 100% of the tuition cost is eligible for this scholarship.

Some STO's may accept 2022 or 2023 tax credit dollars recommended for 2023 or 2024 students. These funds will be held for them and can be applied to tuition in August. Each student must be registered with the STO through an application process.

Please see the STO resource list for specific details of School Tuition Organizations (STO's).

FOR MORE INFORMATION ON HOW TO MAKE THIS PROGRAM WORK FOR YOU, WE RECOMMEND THAT YOU SCHEDULE A MEETING WITH ONE OF BOURGADE'S FINANCIAL AID SPECIALISTS AND ATTEND ONE OF THE BOURGADE CATHOLIC CLASSES OFFERED THROUGHOUT THE YEAR.

Arizona Empowerment Scholarship

ESA is an account administered by ADE that is funded by state tax dollars to provide educational options for qualified Arizona students. Qualifications are based on [State Legislature](#) with the intentions to provide a world-class education to all Arizona students through innovative education reform. By opting out of the public school system, parents can seek a range of alternative educational services, such as private school or home-based education, to tailor an individualized educational plan that is best for their child.

All Students can now qualify for the Universal Empowerment Scholarship Account (ESA) Program! If your family falls under a higher income category, this may be a good financial aid option. Funding is based on District of Residence and determined by variety of factors that are subject to change, depending on School Finance funding calculations. The estimates below provide basic guidelines for determining annual funding amounts. Please keep in mind that amounts vary between districts and fiscal years.

- **Base Funding:** This amount is 90% of what is given to the District. Funding could range from approximately \$6,000 to approximately \$30,000 per year, depending on grade, school, district of residence/district of attendance, funding category, disability, etc.
 - Student with 504 Plan: Base Funding
 - Student with MET evaluation report/IEP: Base Funding + varied amount depending on diagnosis (shown below)
 - Developmental Delay, Emotional Disability, Learning Disability, Speech/Language Impairment
 - Orthopedic Impairments
 - Moderate Intellectual Disability
 - Hearing or Visually Impaired
 - Autism, Severe Intellectual Disability, Severe Sensory Impairments

To participate in the program, applicants abide by an annually signed contract that includes the following:

- Student cannot be enrolled in a public school (including charters and public online schools)
- Student cannot be enrolled in a summer public school program (including charters and public online schools)
- **Student cannot receive any School Tuition Organization (STO) scholarship or any tax credit scholarship**
- Applicant submits quarterly expense reports, with uploaded receipts, by a given deadline
- Applicant adheres to the approved expenditures
- Applicant spends a portion of the quarterly funds every quarter and at least 25% of their annual award per year

For more information on the Empowerment Scholarship- Azed.gov/esa

Catholic Parishioner Scholarship

Students whose families are verified to be registered and active members of a Catholic parish within the Diocese of Phoenix are eligible to receive the \$4,730 Catholic Parishioner Scholarship. This scholarship is eligible for annual renewal.

Other Scholarships and Grants

Thanks to the many supporters of the mission of Bourgade Catholic High School, there are several financial aid and scholarship opportunities available to those students that demonstrate a need.

American Legion

Catholic Community Foundation

Arizona Community Foundation

Gila River Indian Tribe

Knights of Columbus

Black Catholic Ministries

Catholic Daughters of America

Father Joseph Patterson Foundation

Kiwanis Club

Parish or Church

We recommend you contact these organizations directly for more information.

Bourgade Catholic Supplemental Financial Aid Scholarships

Students receiving Bourgade Catholic supplemental financial aid scholarships are the beneficiaries of the Bourgade Catholic Scholarship Fund.

Additional requirements include completed Catholic Education Arizona scholarship application, maximization of Arizona tax credit scholarships available, a minimum GPA of 2.5, acceptable attendance history and acceptable discipline history. Please note: it is not possible to meet all requests in full. Financial aid covers only a portion of the tuition costs.

There are many other opportunities for financial assistance! We recommend you search the internet and contact your schools, parish and community organizations for funds that are available. Inquire about scholarships in the private sector through parent workplaces and local or national fraternal or civic organizations. Many Bourgade Catholic students contribute to the cost of their education through after-school and weekend jobs.

THIS INFORMATION IS ALSO AVAILABLE AT WWW.BOURGADECATHOLIC.ORG

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