

Oregon IDA Initiative



Individual Development Accounts invest in the personal & financial growth of individuals to build strong communities throughout Oregon.

2011 State of Oregon Individual Development Account (IDA) Tax Credit Donor Form

Date: _____

Name of taxpayer (business or individual): _____

Mailing address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

If you have donated in previous years please check if this is a new address since 2010.

CPA, Financial Advisor and/or Broker

Name of Tax Advisor: _____

Firm: _____

Address: _____

Phone: _____ Email: _____

Purchase Method:

Check Amount on check: _____

Please make checks payable to **Neighborhood Partnerships**.

NOTE: Contributions must be post-marked by **December 31 2011** for a 2011 tax credit

Credit Card Available online at ida.neighborhoodpartnerships.org

NOTE: Please review *Purchasing Oregon IDA Tax Credits With Credit or Debit Cards Online* suggestions on p. 2 of this form

Stock or Mutual Fund

NOTE: Please follow DTC stock transfer instructions on p. 3 of this form *Purchasing IDA Tax Credits with Stocks or Mutual Funds*

Stock symbol: _____ # of Shares: _____

Mutual Fund symbol: _____ # of Shares: _____

Please mail this form and payment to:

Neighborhood Partnerships

ATTN: IDA Tax Credits
310 SW 4th, Suite 715
Portland, OR 97204
Fax: 503-226-3027

Questions? Contact Kathy Turner: 503 226-3001 x101 or 503 548-4475 or email at kturner@neighborhoodpartnerships.org

The Oregon IDA Initiative is a project of Neighborhood Partnerships
310 SW 4th Suite 715 Portland OR 97204 503 226-3001 503 226-3027 fax
503 548-4475 IDA Tax Credits <http://ida.neighborhoodpartnerships.org>

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Purchasing Oregon IDA Tax Credits With Credit or Debit Cards Online

Thank you for your interest in purchasing Oregon IDA Tax Credits online! Here are a few suggestions to make the process easier to complete.

- Step 1:** Please ***contact your credit card in advance to secure advance approval*** of the transaction. Google has a \$25,000 per transaction limit, so if you are planning to donate more, please advise your credit card to approve multiple transactions.
- Step 2:** Log onto <http://ida.neighborhoodpartnerships.org> Press the link that says ***I'm ready to contribute to the IDA tax credit***, then go to the link that says ***Donate Now ONLINE*** and follow the instructions for donating.
- Step 3:** Please ***check your Google email account regularly for messages*** about the transaction, especially when it is near the end of the year. When you make a contribution to purchase Oregon IDA Tax Credits, you are asked to create a Google account. All messages regarding your contribution are sent to the Google email address.
- Step 4:** Please retain receipts and records. **Your contribution will appear on your credit card statement as "Google—IDA Tax Credit."**

We are not able take credit card contributions over the phone at this time.

Contributions must be received by ***midnight pacific time*** on December 31 2011 to be eligible for 2011 Oregon tax credit.

Questions? Contact Kathy Turner: 503 226-3001 x101 or 503 548-4475 or email at ktturner@neighborhoodpartnerships.org

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Instructions for Purchasing Oregon IDA Tax Credits with Stocks or Mutual Funds

*If you are purchasing Oregon IDA Tax Credits with Stocks or Mutual Funds, we must receive them in our account by **December 31 2011**; we advise to initiate the transfer well before as the transfers can take a few days to arrive in our account. Thank you.*

Step 1: Please mail or fax the Tax Credit Donor Form, with your complete contact information and stock detail, to the Neighborhood Partnerships.

Neighborhood Partnerships

ATTN: IDA Tax Credits
310 SW 4th, Suite 715
Portland OR 97204
Fax: 503-226-3027

Step 2: Transfer the securities from your account to the brokerage account for the Neighborhood Partnerships at Chase.

The NP Account information is:

DTC: 0352 JPMorgan Clearing Corp.

Neighborhood Partnerships

Account # 73539798

JPMorgan Clearing Corp.
4 Chase Metrotech Center
Mail Code NY1-C060
Brooklyn, NY 11245-0001

Wiring Instructions: ABA# 021000021; F/A/O JPMCC A/C #066-001633; FCC
Account # 73539798 Neighborhood Partnerships

If you have any questions about the transfer process, please contact Dane Bradford at 503-238-3413 at Chase.

Step 3: When you initiate the transfer, notify Kathy Turner at 503-226-3001 x101 or kturner@neighborhoodpartnerships.org so that we can monitor the NP account, sell the stocks when they arrive and connect them back to the donor. The sale price will establish the final value and the number of tax credits purchased.

A receipt will be sent to you within 5-7 business days of the transfer.

The Neighborhood Partnerships federal tax ID # is 91-1943624.

Questions? Contact Kathy Turner: 503 226-3001 x101 or 503 548-4475 or email at kturner@neighborhoodpartnerships.org