

Kutz H&S Reimbursement Policy 2016-2017

Kutz Home & School Association is registered as a charitable, nonprofit, tax-exempt 501(c)(3)

Our Association is organized and operated exclusively for exempt purposes set forth in IRS section 501(c)(3). It must not be organized or operated for the benefit of private interests, and none of its earnings may inure to any private individual.

Our H&S Association is also Pennsylvania sales tax-exempt.

What does it mean to be tax-exempt?

H&S can accept tax-free donations to our organization. Our fall fundraiser is a perfect example. We, as an entity, do not have to pay federal, state or local taxes on any donations received.

What does it mean to be PA sales tax-exempt?

H&S does not have to pay Pennsylvania sales tax on any purchases made for our organization.

How does the sales tax exemption affect my committee making purchases?

Because H&S is exempt from paying Pennsylvania sales tax, H&S cannot reimburse any tax paid on purchases. You must notify the merchant that you are making a purchase for a tax-exempt organization and show proof of our tax-exempt status.

How do I show proof of our tax-exempt status?

You simply show the merchant the attached PA Certificate of Exemption form or provide the merchant with the Account ID number: 75-514402.

What can I use the tax-exempt certificate for?

You may use the PA Certificate of Exemption certificate only when making purchases for H&S.

Example: *Your committee would like to purchase coffee and bagels for Kutz staff.*

1. You go to the store and purchase the coffee and bagels. At the checkout, you notify the cashier you are making a purchase for a nonprofit, tax-exempt organization.
2. The cashier will ask you for the certificate or the account ID number.

You may not use the tax-exempt certificate when purchasing other items that are not for H&S.

Example: *Your committee would like to purchase coffee and bagels for Kutz staff. While you are there getting coffee and bagels for H&S, you also decide to purchase a small coffee, breakfast sandwich and a granola bar for yourself.*

1. You pay for the items separately.
2. One bill should have the bagels and coffee for H&S for which you can use the PA Certificate of Exemption and not pay any sales tax.
3. The other bill includes the small coffee, breakfast sandwich, and granola bar that you purchased for yourself. You must pay PA sales tax on the personal items. You may not use the PA Certificate of Exemption when purchasing personal items.

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What happens if I use the tax-exempt certificate to make a personal purchase?

Use of the certificate for personal purchases will result in cancellation of exempt status.

How do I get reimbursed for my purchase?

Within 30 days of purchase, you must submit the attached reimbursement form (sample below).

Kutz Home & School Association

Request for Reimbursement Form

- Please submit reimbursements within 30 days of purchase and prior to June 20, 2017.
- Reimbursements will only be issued with a completed form and receipt(s).
- You will not be reimbursed for any PA sales tax paid. Our organization is exempt from paying PA sales tax on purchases made directly for H&S. Please show our tax exempt certificate prior to paying for any items or services. If a receipt is received with tax, you will only be reimbursed for the item amount.

Date of request:

Who is requesting reimbursement?

What is your committee name?

How can I contact you? Email address or phone

Who should the check be made out to?

Where should the check be sent?

What is the total amount to be reimbursed/paid?

What was purchased and for what purpose
(general explanation – please attach all receipts)?

Were you charged tax on the purchase?

Yes No

Is this purchase been approved by committee head?

Yes No

Is this purchase within your committee's budget?

Yes No

Please attach **all receipts** and mail this form to:

Diane Torrens
5000 Kelly Road
Warrington, PA 18976

You can also scan this form and **all receipts** and send to: dmtorrens@gmail.com

For Internal Use Only

I approve this reimbursement:

Dr. Nadine Garvin

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Where can I find the reimbursement form?

This form can be found on the Kutz Home and School Link on our Kutz School Website.

The screenshot shows the Paul W. Kutz Elementary School website. At the top, there is a navigation bar with links for District Home, Elementary Schools, Secondary Schools, and a language selector. The school's logo and name are prominently displayed. Below the header, there are tabs for Home, Our School, Department/Grade Level, Parents/Students, and Teacher Websites. The main content area features a large photo of the school building with tulips in the foreground. To the right of the photo is a calendar of upcoming events for September and October. Below the photo is a notice about updating family census information. At the bottom, there is a 'Welcome to the Kutz Elementary School Website!' message and a 'SCHOOL LINKS' menu. A red arrow points to the 'Home and School' link in the menu.

UPCOMING EVENTS

SEP 14	12:00 PM - 9:30 PM H&S Yogurt Tree Fundraiser
SEP 14	6:00 PM - 7:00 PM Back to School Night for PEN
SEP 28	6:30 PM Home and School Meeting
SEP 30	6:30 PM Family Fun Movie Night
OCT 3	Rosh Hashanah - No School
OCT 6	Picture Day!

SCHOOL LINKS

- Attendance
- CB Cares/Backpack Newsflash
- FREE Ways to Help Kutz
- **Home and School**
- School Performance Profile
- Elementary Progress Report Information

What if I have additional questions?

Just ask! Reach out to our co-treasurers.

Diane Torrens handles all reimbursements, outgoing money, and the budget for our H&S Account. She can be reached at dmtorrens@gmail.com or 215.499.9172.

Kate Gingras is our co-treasurer who handles all deposits and incoming money for our H&S account. If checks need to be deposited, or you have questions regarding deposits, please reach out to Kate. She can be reached at kgingras7@yahoo.com or 215.280.8911.

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Certificate of PA Tax Exemption Document for Kutz Home & School Association:

Envelope ID: BU1003304793 Revenue ID: 1001027318 Page 2 of 2

REV-1510009 APP (10-14)

Commonwealth of Pennsylvania
Department of Revenue

CERTIFICATE OF EXEMPTION

KUTZ HOME & SCHOOL ASSOC
1950 TURK RD
DOYLESTOWN PA 18901-2841 USA

Account ID: 75514402 Exemption Type: Charitable
Revenue ID: 1001027318 Expiration Date: 02/28/2021



USE OF THIS CERTIFICATE FOR PERSONAL OR NONEXEMPT PURCHASES WILL RESULT IN
CANCELLATION OF EXEMPT STATUS

DEPARTMENT OF REVENUE

This certificate is not assignable or transferable.

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