



# SUPPORT PUBLIC EDUCATION *and save money on your tax bill!*

The Montana Legislature passed House Bill 279 in 2021. This bill allowed Montana taxpayers to receive a dollar-for-dollar credit on their state income taxes, up to \$200,000 per year, for donations to Montana public school districts to support Innovative Educational Programs. The response to this opportunity in its first year was huge. Individual Montana taxpayers donated \$1 million to our public schools. In the coming year, the state-wide tax credit limit will increase to \$5 million. Donated amounts may not exceed the taxpayer's income tax liability, but may be carried forward for 3 years.

YOUR donation can help MCPS expand our innovative educational programs that benefit local students through enhanced:

- Transformational and advanced learning opportunities
- Programs, services and equipment for students with disabilities
- Work-based learning partnerships for students
- Post-secondary credits and/or career certifications for students
- Technologies that improve student experiences and opportunities

## MAKE YOUR DONATION EARLY!

In its first year, Montanans were so excited to donate to their local public schools that the 2022 credit limit of \$1 million was reached in the first 6 minutes of the Department of Revenue (DOR)'s donation portal opening. Twenty-three tax payers received credits and eight school districts received donated funds. Due to the overwhelming popularity of this program, the procedures to accept donations were modified for future school years. With these changes in mind, it is critical for those interested in donating to contact their public school district no later than Monday, January 15, 2024, so school district administrators have the information they need to obtain approval for donations.

# *INTERESTED IN DONATING?*

## **Here's How it Works:**

- When you make a cash donation to MCPS for Innovative Educational Programs, submit the attached form, which includes all of the required information to qualify for the tax credit.
- MCPS will enter this information together with the amount donated into the DOR Education Donations portal.
- Once MCPS records the donation in the DOR Portal, the DOR will preapprove the donation (so long as the individual and statewide thresholds noted above have not been exceeded) and you will receive a confirmation number along with a **receipt that you will file with your 2024 taxes.**
- Your donation will be returned if it is not approved by the DOR.

The statewide aggregate threshold of \$5 million is tracked on the DOR Education Donations Portal homepage and anyone can view how much of the credit has been reserved, how much is available, along with how much is pending.

If you do not use the attached form, the following information is required when you make your donation: your name; the last four digits of your social security number (SSN); or Federal Employer Identification Number (FEIN); your mailing address; your physical address; your email address.

Links:            [Donation Form](#)  
                     [DOR Guidelines](#)  
                     [State Statute](#)

## *QUESTIONS? Contact:*

If you're interested in donating or have any questions, please contact Missoula County Public School's Executive Director of Business and Operations Pat McHugh at (406) 728-2400, ext 3020 or [pmchugh@mcpsmt.org](mailto:pmchugh@mcpsmt.org) or Dona Losett at the Montana Department of Revenue at (406) 444-1991 or [dona.losett@mt.gov](mailto:dona.losett@mt.gov).

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