

DONATION FORM:

Complete all fields and mail with your donation.

- Individual Donation **or**
 Business Donation (please select one)

NAME

ADDRESS

CITY/STATE/ZIP

EMAIL

TELEPHONE

DONATION AMOUNT

DATE

- Support any eligible school
 Support the following school:

Make checks payable to:

Sagamore Institute SGO

Mail form and check to:

SEC at Sagamore Institute
2902 North Meridian St.
Indianapolis, IN 46208

- Please check here if you would like to receive your receipt letter via email. Be sure that your email address is written clearly!

DONOR FAQs

What is Sagamore Institute? Sagamore is an Indianapolis-based public policy research organization that promotes education excellence. Sagamore's Scholarships for Education Choice program is certified by the State of Indiana as a Scholarship Granting Organization (SGO).

Is there a limit to how much I can give and still receive the tax credit? No, there is no limit on your donations as long as there are tax credits available. The credit is applied to your state tax liability. It may be carried forward up to nine subsequent years but may not be carried back or refunded.

Who receives the scholarships? Indiana K-12 students who meet the income eligibility guidelines and attend a participating school.

Can I designate a school or student to receive my gift? Yes, and no. You may designate one of our participating schools to receive your gift. However, SGO donations may not designate a particular student; this would be considered a tuition payment and is not eligible for a tax credit.

How do I claim my credit? The receipt letter that you receive from Sagamore Institute will include the amount of the donation, the tax credit certification number, and instructions for claiming the credit. We also send out year-end letters in January which include donation information and detailed instructions.



**SCHOLARSHIPS FOR
EDUCATION CHOICE**

— SAGAMORE INSTITUTE

Indiana's School Scholarship
Tax Credit Program

DONOR INFORMATION

**SAGAMORE
INSTITUTE**

INNOVATIVE IDEAS. REAL RESULTS.

2902 North Meridian St.
Indianapolis, IN 46208
317-472-2052

scholarships@sagamoreinstitute.org

SCHOLARSHIPS FOR EDUCATION CHOICE
IS A PROGRAM OF SAGAMORE INSTITUTE

WHY DONATE?

Do you believe that Indiana families should be able to choose the best educational setting for their K-12 students?

Do you believe that their choices should not be limited by their income level?

Would you like to support scholarships for eligible students enrolled in participating schools across the state of Indiana, or perhaps designate a donation for students of a particular school?

If so, the tax credit scholarship program may be just the investment for you. In addition to supporting Indiana students, you will receive a state tax credit equal to 50% of the amount of your donation.

“ The leverage provided by the tax credit has allowed us to easily double what we would otherwise give. As a business leader and member of our community, it feels great to have our local government encourage generosity toward such a critical and strategic arena.”

-SGO Donor

KEY FACTS



Donors receive a **50% state tax credit** that can be applied to your Indiana income tax liability.



The tax benefits allow you to multiply the impact of your giving dollars.



Both individuals and businesses may donate and receive the state tax benefit.



Many employer matching programs will match gifts made to the SGO.



Funds are used to support **scholarships** for eligible middle and low income students attending private K-12 schools in Indiana.



If you itemize on your federal return, be sure to include your SGO donation as a **charitable deduction**. For some donors, a federal tax savings will result.

PLEASE CONSULT A TAX PROFESSIONAL ABOUT YOUR INDIVIDUAL TAX SITUATION

WAYS TO GIVE



Complete the donation form on this brochure and mail it along with a **check** made out to Sagamore Institute SGO.

Donate Online using a credit card or checking account to set up a one-time or recurring donation. Visit our website at s4ec.com, click on Donate Now.



Give **non-cash assets**, like appreciated stock through our fund with National Christian Foundation. You will need to complete a donation form available on our website at s4ec.com, click on Donors and then Non-Cash Assets.



Donors over 70 1/2 may give using a direct contribution from an **IRA** (qualified charitable distribution). Contact us or the institution that holds your IRA for additional information.

