



THE SUMMIT LIGHTHOUSE, INC.

Student Scholarship Organization

Scholarship Donations

The Summit Lighthouse, Inc., is a Student Scholarship Organization (SSO) under the Montana Department of Revenue's Student Scholarship Organization Tax Credit program. Scholarships from this Student Scholarship Organization may be used at any qualified education provider of the parent's or legal guardian's choice.

The Student Scholarship Organization Tax Credit is available to individuals, estates, trusts, and business taxpayers. This credit is not refundable but can be carried forward up to three years. The tax credit is equal to the donation amount, with a maximum of \$200,000 per individual or business and \$400,000 per couple.

To claim this credit for your 2026 taxes:

1. Make your donation between January 1 and January 19, 2026.
Mail or hand deliver your check to:
The Summit Lighthouse
Business Office, attn. Student Scholarships
63 Summit Way
Gardiner, MT 59030
Please make your check payable to The Summit Lighthouse with "Student Scholarship Organization" in the memo line.
2. Complete the attached information form and submit it with your check. This information is necessary for us to claim the tax credit on your behalf.
3. The school will submit your information through the Montana Education Donation Portal when applications open on January 21st, 2026, for pre-approval of the tax credit.
4. Once pre-approved, we will forward to you a confirmation number and a tax credit receipt to attach to your tax return.

Note that the aggregate state-wide credit available for 2026 is \$7.2 million and the credit is allocated on a first-come, first-served basis until the aggregate total is reached. If we are not able to receive approval for your credit before this limit is reached, we will return your check. In this case, you would also have the option to make a tax-deductible donation (rather than claiming a tax credit).

For complete information about Montana’s SSO Tax Credit program, see <https://revenue.mt.gov/publications/tax-credits-for-qualified-education-contributions-guide> and <https://svc.mt.gov/dor/educationdonation2/FAQ>

If you have any questions, please feel free to contact our Business Office via phone or email at: (406) 848-9200 or TSLinfo@tsl.org. Please note that we are not able to offer individual tax advice, and we recommend you contact your tax advisor.

Sincerely,

The Board of Directors of The Summit Lighthouse, Inc.
Student Scholarship Organization

Donor Information Form

Full Name or Company Name: _____

Donation Amount: _____

Full EIN (business) or last 4 of SSN (personal): _____

Last 4 of SSN of spouse (if filing jointly): _____

Mailing Address: _____

Physical Address: _____

Email: _____

Phone: _____

Signature: _____ Dare: _____

Additional comments: