

## ACE SCHOLARSHIPS MONTANA OFFERS A 100% STATE INCOME TAX CREDIT FOR DONATIONS.



Annual tax credit limit of \$200,000 per donor



Businesses and individuals with state income tax liability may contribute



\$8.64 million in credits available for 2027



Over 65 ACE partner schools statewide



At least 90% of each donation is used to fund scholarships

### WHAT HAPPENS TO THE DONATION?

- » ACE Scholarships uses it to provide scholarships for students in working-class families to attend quality nonpublic schools.
- » ACE Scholarships processes your donation with the Montana Department of Revenue and secures your 100% state income tax credit.

### WHAT ARE THE ADVANTAGES?

- » Donors can reduce or eliminate their Montana state tax liability by donating to ACE Scholarships.
- » A non-refundable, dollar-for-dollar state income tax credit is earned when a donation is made.
- » If your tax estimation is more than what you owe, you can carry your tax credit balance forward for future years.

### WHO IS ACE?

- » ACE Scholarships is a 501(c)3 charitable organization with a 25-year track record of success in 13 states across the country.
- » Since starting in Montana in 2012, ACE Scholarships has delivered over 11,450 scholarships totaling almost \$25 million worth of investments in students throughout the state.
- » ACE scholars consistently attain higher graduation rates and ACT scores and matriculate to college at a higher rate than their peers.
- » By helping students attend ACE partner schools, you are helping keep the Montana K-12 private education sector strong and allowing these schools to reach more kids each year.

### NEXT STEPS & HOW TO DONATE

- » Speak to your CPA or tax advisor about your expected tax liability for 2027.
- » Make a donation to ACE Scholarships Montana SSO on or after January 1, 2027.

#### CHECK DONATION

**Processing Center:**  
ACE Scholarships Montana SSO  
5251 DTC Pkwy, Ste 300  
Greenwood Village, CO 80111

**Make checks payable to:**  
ACE Scholarships Montana SSO

#### CARD TRANSACTIONS

**Over phone:** Tina Burke,  
(303) 407-0611

**Online:**  
[acescholarships.org/donate-mttaxcredit/](https://acescholarships.org/donate-mttaxcredit/)

- » Fill out an ACE Scholarships commitment form. To access the form, scan the QR code below or visit <https://www.acescholarships.org/mttaxcredit/> and click on **Fill Out Form Here**.



- » Checks dated between January 1 and December 31, 2026, will qualify for a 2026 tax credit, until the cap has been met.
- » Once approved, you will receive further instructions and documentation from ACE on how to claim the credit amount on your tax returns.



For questions or to speak with someone directly, contact  
**Lisa Russell, President of ACE Montana and Wyoming**  
C: 406.628.8366 E: [lrussell@acescholarships.org](mailto:lrussell@acescholarships.org)

THANK YOU FOR YOUR  
GENEROUS SUPPORT!