



## WEST VALLEY SCHOOL

2290 Farm to Market Road  
Kalispell, MT 59901  
406-755-7239  
westvalleyschool.com

Dear West Valley Families and Community Members,

We wanted to share some news about an exciting and unique opportunity for you as a Montana taxpayer. Now you can save money and use your tax bill dollars to directly support the West Valley School District. The **Innovative Educational Program Tax Credit** is available to individuals, estates or trusts, corporations, partnerships, and LLCs.

In 2023, Montana legislature approved a program that allows you or your corporation to donate to our school and receive a *dollar-for-dollar tax credit* on your state tax bill. Donations would go to support innovative educational programs, facilities updates/improvements, safety upgrades, access to technology and science materials, and more.

This program has a total of \$6 million in tax deductions available for all Montana public schools. Donations are processed on a first come, first served basis by the Montana Department of Revenue. The key is to *act now* before the donation cap is reached.

### HERE IS HOW THE INNOVATIVE TAX CREDIT WORKS!

- If you or your business want to make a cash donation to West Valley School, you can complete the form included or download it [here](#) and mail it or drop it off at the school **OR** you send an email to [taxcredit@westvalleyschool.com](mailto:taxcredit@westvalleyschool.com) and make sure you tell us in writing that it is for “innovative educational programs.” You can send the email anytime. When the State portal opens on Wednesday, January 15, 2025 at 10:00 AM, we will be processing these emails on a first come first served basis. There is a chance that the \$6 million cap will be met before we can get your donation recorded so the sooner, the better to make sure you receive your tax credit.
- In the email you will need to provide the District with the following information:
  - Amount of the donation
  - Your Name (Business Name)
  - Last four digits of your Social Security Number (SSN) or Federal Employer Identification Number (FEIN)
  - Your mailing address
  - Your physical address
  - Your Email address
- West Valley School must have receipt of the cash donation (or check) before we can pre-register the donation. A pledge or promise of a donation is not sufficient for West Valley to preregister a donation with the Department of Revenue (DOR).
- West Valley will enter your information in the Education Donations Portal. All information is confidential tax information and will not be shared publicly.
- Once the District records the donation, the DOR will pre-approve the donation (so long as the individual and statewide thresholds noted above have not been exceeded) and you will receive a confirmation number and receipt that you will include when you file your 2025 taxes.

Donations will need to be received by **January 14, 2025 at 12:00 pm to be entered into the State portal on January 15, 2025 at 10:00 AM**. Donations can not be counted toward the tax credit until actual funds are received. Tax credits are not considered official until all funds are received and approved by the Montana Department Revenue. If approved, a confirmation code will be provided to you for tax preparation purposes. If the \$6 million dollar cap is met before your donation is entered, you will have the opportunity to receive your money back or turn it into a donation to West Valley School. If you have any more questions, please contact Superintendent Richard Gross via email at [rgross@westvalleyschool.com](mailto:rgross@westvalleyschool.com).



# INNOVATIVE TAX CREDIT DONATION FORM

YES! Please count me in with my donation toward Innovative Educational Programs for West Valley School District. I understand by submitting this form, along with my donation, that I am not guaranteed a dollar-for-dollar credit on my taxes as outlined in Montana House Bill 279, but that West Valley will submit my donation for approval in the Montana Department of Revenue (DOR) Education Donations Portal. If my donation accepted by the DOR, I will receive a receipt from West Valley to submit with my 2025 taxes. **Funds must be received at West Valley no later than January 14, 2024 at 12:00 PM.** When the State portal opens on Wednesday, January 15th at 10:00 AM, donations will be processed on a first come, first served process.

I am donating as a **BUSINESS**  **INDIVIDUAL**  (please check applicable box)

**NAME:** \_\_\_\_\_  
Business Name if donating as a Business or First and Last if donating as an Individual

**PHYSICAL ADDRESS:** \_\_\_\_\_  
Street

\_\_\_\_\_  
City, State, and Zip Code

**MAILING ADDRESS:** \_\_\_\_\_  
Street or PO Box

\_\_\_\_\_  
City, State, and Zip Code

**EMAIL ADDRESS:** \_\_\_\_\_

**Last Four Digits of your SSN (Social Security Number for Individuals) or FEIN (Federal Employer Identification Number for Businesses) :** \_\_\_\_\_

**Dollar Amount of Your Donation:** \_\_\_\_\_

Please return this form with your donation to West Valley School District; Attn: Innovative Education Tax Donation; 2290 Farm to Market Road, Kalispell, MT 59901. If you have any questions, please contact Richard Gross at [rgross@westvalleyschool.com](mailto:rgross@westvalleyschool.com)