

## SGO SCHOLARSHIPS AND VOUCHERS

Here are some key things you need to know about the SGO (or Tax Credit) Scholarship Program and the Choice Scholarship Program (also called the voucher program). These are *two different programs*, but they work together in some key ways.

The Choice Scholarship Program provides state-funded scholarships to eligible Indiana students to offset tuition costs at private schools. Your school may or may not be participating in the Choice Scholarship Program.

To be eligible for a Choice Scholarship, students must meet eligibility criteria AND must have a “track” to the scholarship. One of the eligible “tracks” is receiving an SGO Scholarship of at least \$500 in a prior year. That means that your student who receives an SGO Scholarship and any siblings would have a “track” for a future Choice Scholarship.

A student who meets the requirements for a Choice Scholarship may also qualify for an SGO Scholarship in the same school year, provided that the combination of the two does not exceed tuition and fees.

## FREQUENTLY ASKED QUESTIONS

**What if I had a significant change in income after completing the tax return?** We understand that a job loss or other circumstance may result in an income that is different than your previous year’s tax return would reflect. You may submit proof of your current annual income to your school and ask them to fill out the necessary form to document that change. Depending on the circumstances this may have to wait until the end of the calendar year or when the next year’s 1040 becomes available.

**What if we move in the middle of the school year?** The SGO scholarship is not transferable to another school if a student moves.

**What are the benefits of donating to this program?** Donations to the SGO Scholarship Program qualify for an Indiana state tax credit of 50% of the value of the donation. Businesses and individuals may make contributions and designate a specific school they wish to support.

**Can I make a donation?** Yes, the donor section of our website [www.s4ec.com](http://www.s4ec.com) will provide all of the information you may need. Please note that you may NOT designate a specific student to receive your gift.

**What is Sagamore Institute?** Sagamore Institute is an Indianapolis-based 501c3 non-profit organization and a certified Indiana Scholarship Granting Organization.



SCHOLARSHIPS FOR  
EDUCATION CHOICE

at SAGAMORE INSTITUTE

## INDIANA’S SGO (or TAX CREDIT) SCHOLARSHIP PROGRAM

## Information for Students and Families

Please visit our website at  
[www.s4ec.com](http://www.s4ec.com)

Contact Us:  
[scholarships@sagamoreinstitute.org](mailto:scholarships@sagamoreinstitute.org)  
317-472-2052

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## DOES MY CHILD QUALIFY?

The statute authorizing the Indiana School Scholarship Tax Credit Program requires an eligible scholarship recipient to be:

- A resident of Indiana
- At least five (5) and less than twenty-two (22) years of age and enrolled in a participating school\*
- A member of a household with an adjusted gross income (AGI) of 300% or less of the amount required to qualify for the federal free and reduced meal program (see table)

Eligibility Guidelines 2021-2022	
Household Size	Income Limit
1	\$71,484.00
2	\$96,681.00
3	\$121,878.00
4	\$147,075.00
5	\$172,272.00
6	\$197,469.00
7	\$222,666.00
8	\$247,863.00
Each Additional	\$25,197.00

\*Students entering kindergarten must be 5 by August 1st unless the school determines that a child with a later birthdate is kindergarten-ready and agrees to enroll that child in kindergarten.

## HOW IS MY INCOME VERIFIED?

You may use ONE of the options below:

- If your school uses a third-party vendor to collect household income documentation to evaluate financial need (i.e. FACTS) and you have submitted all required information, you will not need to provide us with additional documentation.
- Copy of Federal 1040 for ALL members of a household. MUST be for the taxable year IMMEDIATELY preceding the date the scholarship application was submitted. *Tax returns should be for 2020 when applying for the 2021-22 academic year.*
- If you do not file a 1040 then we can utilize an assurance form with documentation of income (copy of participation cards for TANF or Food Stamps/SNAP, benefit statements from other sources of income).
- If the applicant is a foster child, written proof automatically qualifies the child for the scholarship.

\* For purposes of program eligibility, the term “household” means a group of related or unrelated individuals who are living as one economic unit (sharing housing and income/expenses). All members counted in “size” should be included in income calculation.

## HOW DO I APPLY?

