



## SGO@HMS - Redirect Your Taxes to HMS



### What is a SGO?

SGO stands for Scholarship Granting Organization. In 2021, the Ohio legislature established a tax credit allowing the Ohio tax payer to contribute up to \$750 per individual/\$1,500 per couple to non-profit organizations like HMS (Sect. 5747.73); this allows a dollar-for-dollar reduction in Ohio income tax liability.

### How to do it?

You can contribute to the SGO @ HMS using an online portal administered by OAIS (Ohio Association of Independent Schools) via credit card or ACH. As a member of OAIS, we use their portal to receive SGO funding. You can also mail a check into OAIS (please email the address below for a hard copy form).

### Why?

Your contribution will directly benefit HMS as we can use it to help families in need afford a HMS education. You receive a dollar-for-dollar reduction of your Ohio tax liability; in essence, you now have ownership over your taxes by redirecting them from Ohio to HMS.



**Use QR Code to Contribute or  
Visit [HudsonMontessori.org/SGO](https://HudsonMontessori.org/SGO)**

**Questions? Email [SGOConcierge@hudsonmontessori.org](mailto:SGOConcierge@hudsonmontessori.org)**

# SGO @ HMS - Q & A



**Why should utilizing the SGO be important to you?** Redirecting your taxes to the SGO @ HMS allows you to receive a tax credit rather than a standard tax deduction. Taxpayers can reduce their Ohio income tax liability up to \$750 (individual) or \$1,500 (jointly); this can be a great tool to use when preparing your taxes.

**How will HMS use funds from the SGO @ HMS?** Per Ohio legislation, contributions to the SGO @ HMS are prioritized for students and families demonstrating financial need. It allows us to use funds that would have otherwise been allocated for financial assistance for other areas of our school's operations.

**Should you contribute to both the SGO @ HMS and the Hudson Montessori Fund?** We encourage everyone to participate in our annual fund. SGO @ HMS allows our constituents to redirect their Ohio income taxes to HMS by taking advantage of this tax filing benefit.

**When do you need to make the contribution?** You must make the contribution (a maximum of \$750 per individual/\$1,500 per couple) prior to filing your 2025 taxes up until the deadline of April 15, 2026.

**Who can participate in the SGO @ HMS?** Anyone who resides and has tax liability within the state of Ohio. Citizens of other states are unable to participate.

**Help us build upon last year's success!** Nearly 40% of our HMS families contributed last year, which helped provide \$140,000 towards financial assistance.

**Any additional questions?** Contact Tim McQuait, who oversees SGO @ HMS outreach, at [SGOConcierge@hudsonmontessori.org](mailto:SGOConcierge@hudsonmontessori.org). We also recommend speaking with your tax preparer.

**Your contribution will be recognized in an edition of *The Hoot*, our bi-annual publication.**



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