



Welcome to Tax News You Can Use!

January 31, 2019 - Archived Edition

[Contact us](#) with questions or suggestions.

Montana Publication 1: Prepaying Income Tax is now available

Publication 1 explains the Montana pay-as-you-go system, which includes taxes and estimated taxes.

It also includes information on the Montana Employee's Withholding Allowance Exemption Certificate (Form MW-4) for employers and contains updated versions of the Montana Individual Estimated Income Tax Worksheet (Worksheet ESW) and the Estimated Tax Annualization Worksheet (Worksheet ESA).

[Learn more about Publication 1](#)

[Download Publication 1 in My Revenue](#)

Transferring Your Montana Medical Savings Account (MSA)



[Learn More](#)

In general, an account holder may transfer all or part of their account to an immediate family member—tax-free—at any time, even upon death.

To qualify, the recipient must be a parent, spouse, or child; be a resident of Montana; receive the money in an already established MSA or create an MSA with the transferred funds; and follow all requirements of the program.

[Learn More](#)

Need Copies of Tax Information? Contact our Helena Office

We welcome the opportunity to provide some assistance to your clients with income tax related questions at our Billings, Missoula, Great Falls, Bozeman, Butte, and Hamilton field offices.

However, if your clients need a copy of a previously-filed Montana tax return, a Form W-2 filed by an employer, or a similar tax record, we encourage them to request that information from our Helena office because we have a limited number of income tax auditors in the field offices.

Clients need to complete the [Request for Copies of Tax Information \(Form RTI\)](#) and mail or fax form along with a copy of their driver's license or state ID.

We understand that they often need this information as soon as possible, so the Helena staff makes a point of processing those requests as soon as we receive a completed Form RTI. We can, upon request, fax the tax information the same day we receive the form.

[Learn About Requesting Tax Records](#)

[Download a copy of Form RTI from My Revenue](#)

Approved Tax Software for Tax Year 2018 Now Available

Every year, tax software vendors seek approval to participate in the Montana federal and state electronic filing program. We test the software of each vendor to ensure it's compatible with our electronic filing system.

[See the Approved Tax Software on Our Website](#)

Livestock Reporting due March 1

Livestock reports are due March 1, 2018. Livestock owners can report their livestock online January 1 through March 1 at ReportYourLivestock.mt.gov

[Learn More](#)

Equipment Reporting due March 1

Business and Industrial Equipment owners need to submit their 2019 reporting form online through our [TransAction Portal \(TAP\)](#).

[Learn More](#)

Calendar Events

January 1 through March 1, 2019

[Livestock Reporting](#)

[Business Equipment Reporting](#)

January 31, 2019

[Annual Withholding Reports \(MW-3\) Due](#)

[Annual Hospital Facility Utilization Fee Returns Due](#)

[Quarterly Miscellaneous Tax Returns Due](#)

February 14, 2019

[Second 2018 Bentonite Production Tax Returns and Payments Due](#)

February 15, 2019

[Monthly Alcoholic Beverage Reports Due](#)

[Monthly Cigarette and Tobacco Returns Due](#)

[Monthly Wage Withholding Payments Due](#)

[Supplier Liquor Price Book Submissions Due](#)

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