



# 2024 Montana Form 2 Schedule III – Tax Credits

2024v2  
5/2024

Name \_\_\_\_\_ Social Security Number \_\_\_\_\_

## Part I: Tax Credits

### Nonrefundable Credits

|    |   |    |    |
|----|---|----|----|
| 1  | Total credit for an income tax liability paid to another state or country from Part II, line 21                                     | 1  | 00 |
| 2  | Qualified endowment credit. Include Form QEC  | 2  | 00 |
| 3  | Recycle credit. Include Form RCYL   | 3  | 00 |
| 4  | Apprenticeship credit   | 4  | 00 |
| 5  | Trades education and training credit. Include Form TETC   | 5  | 00 |
| 6  | Innovative educational program credit<br>Credit confirmation code _____<br>Credit confirmation code _____                           | 6  | 00 |
| 7  | Student scholarship organization credit<br>Credit confirmation code _____<br>Credit confirmation code _____                         | 7  | 00 |
| 8  | Contractor's gross receipts tax credit. If multiple CGR accounts, mark here <input type="checkbox"/><br>CGR Account ID: _____ C G R | 8  | 00 |
| 9  | Historic property preservation credit. Include federal Form 3468  | 9  | 00 |
| 10 | Infrastructure users fee credit. Include Form IUFC  | 10 | 00 |
| 11 | Media credit. Include Form MEDIA-CLAIM<br>UCRN _____<br>UCRN _____  | 11 | 00 |
| 12 | Jobs growth incentive credit. Include Form JGI<br>Credit certificate number _____   | 12 | 00 |
| 13 | Carryforward amount from an expired or repealed tax credit (See instructions)<br>Tax credit code _____                              | 13 | 00 |
| 14 | Add lines 1 through 13 and enter the total on page 1, line 9. <b>These are your nonrefundable credits.</b>                          | 14 | 00 |

### Refundable Credits

|    |  |    |    |
|----|--|----|----|
| 15 | Adoption credit. Include Form ADPT   | 15 | 00 |
| 16 | Unlocking public lands credit  | 16 | 00 |
| 17 | Add line 15 and 16 and enter the total on page 1, line 17. <b>These are your refundable credits.</b> | 17 | 00 |

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# 2024 Montana Form 2 Schedule III – Tax Credits (Continued)

Name  Social Security Number

## Part II: Credit For Income Taxes Paid To Another State Or Country

### Montana Ordinary Income Tax

|   |    |    |    |
|---|----|----|----|
| 1 Enter your income sourced and taxable to another state or country that is included in your Montana taxable income or in your Montana source income if a part-year resident, excluding any net long-term capital gains. (See instructions) | 1  |    | 00 |
| 2 Enter all income sourced and taxable to the other state or country<br>Enter state's abbreviation <input type="text"/>   | 2  |    | 00 |
| 3 Income sourced and taxable to Montana excluding your net long-term capital gains (See instructions)   |    |    |    |
| 3a If a full-year resident, enter Form 1040, line 9 excluding your net long-term capital gains  | 3a | 00 |    |
| 3b If a full-year resident, enter expenses related to sourced and taxable income  | 3b | 00 |    |
| Full-year residents subtract line 3b from line 3a.<br>Part-year residents, enter Schedule II, line 17.  | 3  |    | 00 |
| 4 Enter your total tax liability paid to the other state or country   | 4  |    | 00 |
| 5 Enter your Montana ordinary income tax (See instructions)   | 5  |    | 00 |
| 6 Divide line 1 by line 2. Round to 6 decimal places and do not enter more than 1.000000  | 6  | .  |    |
| 7 Multiply line 4 by line 6   | 7  |    | 00 |
| 8 Divide line 1 by line 3. Round to 6 decimal places and do not enter more than 1.000000  | 8  | .  |    |
| 9 Multiply line 5 by line 8   | 9  |    | 00 |
| 10 Enter the lesser of the amounts on lines 4, 7, or 9 here. <b>This is your credit for income tax paid to another state or country for Montana ordinary income tax.</b>  | 10 |    | 00 |

### Montana Net Long-Term Capital Gains Tax

|   |    |   |    |
|---|----|---|----|
| 11 Enter your net long-term capital gain sourced and taxable to another state or country that is included in your Montana taxable income or in your Montana source income if a part-year resident. (See instructions) | 11 |   | 00 |
| 12 Enter all income sourced and taxable to the other state or country<br>Enter state's abbreviation <input type="text"/>  | 12 |   | 00 |
| 13 If a full-year resident, enter federal Schedule D, line 15.<br>Part-year residents, enter Schedule II, line 22.  | 13 |   | 00 |
| 14 Enter your income tax liability paid to the other state or country (See instructions)  | 14 |   | 00 |
| 15 Enter your Montana net long-term capital gains tax (See instructions)  | 15 |   | 00 |
| 16 Divide line 11 by line 12. Round to 6 decimal places and do not enter more than 1.000000   | 16 | . |    |
| 17 Multiply line 14 by line 16  | 17 |   | 00 |
| 18 Divide line 11 by line 13. Round to 6 decimal places and do not enter more than 1.000000   | 18 | . |    |
| 19 Multiply line 15 by line 18  | 19 |   | 00 |
| 20 Enter the lesser of the amounts on lines 14, 17, or 19 here. <b>This is your credit for income tax paid to another state or country for Montana net long-term capital gains tax.</b>                               | 20 |   | 00 |

### Total Credit for Income Taxes Paid to Another State or Country

|   |    |  |    |
|---|----|--|----|
| 21 Add lines 10 and 20. Enter the total here and on Part I, line 1. | 21 |  | 00 |
|---|----|--|----|



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