

May 9, 2013



Montana Tax News You Can Use

From the Call Center: First SOAs mailed

We started mailing the first Statements of Account for the 2012 tax year this week. In past years we've received many calls from taxpayers because they're surprised to see these bills in their mail.

One of the reasons that your clients may be receiving a bill is because they made a payment, such as a quarterly estimated tax payment or return payment, without stipulating which year to apply it. Using the information they have, our cashiering employees sometimes apply a payment to the wrong year.

Please reassure your clients that, if they call us, we can do some research on their payments and can usually have the payment moved to the correct period while they are on the phone.

Legislative update

Here's a list of the tax-related bills that passed the Legislature and was signed into law by Governor Bullock:

- [SB108](#), extending for six years the tax credit on planned gifts to permanent endowment funds of a nonprofit organization
- [SB96](#), lowering the class 8 business tax equipment rate to 1.5 percent on the first \$10 million in equipment and raising the business equipment tax exemption from \$20,000 to \$100,000
- [SB179](#), requiring partnerships with more than 100 members to file their state returns and reports electronically
- [SB117](#), allowing deductions for contributions to qualified higher education savings plans of other states
- [HB444](#), providing an income tax credit to taxpayers who grant public access to their lands that were previously closed

To find out the status of or to read any 2013 bill, click [here](#).

Montana Tax News You Can Use survey

Now that tax season is in the rear view mirror (for most people, anyway), we've asked readers of *Montana Tax News You Can Use* to let us know what they think of the e-newsletter and how we might improve it.

We emailed invitations to take the survey last week and within just a few hours we received more than 50 responses. As of today, we've received 65 responses. Most of them are quite positive, all are important and helpful. Your responses will help us evaluate and improve *Montana Tax News You Can Use* in time for next tax season. Thank you to everyone who took the survey and provided your input.

One of the comments we received told us that we needed to enlarge our font. That's why the font you see now is larger than we've had in previous issues.

If you haven't yet had a chance to complete our brief survey, please take a moment to do so now by clicking [here](#).

And if you'd like to see the results of the survey (without the written responses we've received), click [here](#).

Target tax dates

- The deadline for the annual filing of Form **CLT-4** is May 15.
- **Corporation license tax** is due May 15.

Tax facts

As of May 3...

- Total number of individual income tax returns we've processed: 455,609
- Number of individual tax returns we've received electronically: 400,872
- Number of business returns we've received electronically: 31,614
- Number of individual income tax refunds we've issued: 349,043

- Average amount of refunds: \$429.05
- Average number of days in which taxpayers have received a refund after filing an electronic return: 4
- Average number of days in which taxpayers have received a refund after filing a paper return: 20


Do you have suggestions for our income tax forms?

We continuously strive to provide tax forms that are easily completed and understood by everyone who uses them. To that end, we're now beginning the process of reviewing and updating the Montana tax forms for the next tax year, as we do every year around this time. As a preparer, you use many of these forms on a daily basis and see many different situations play out on them. For that reason, we would like to hear, and would value, any comments or suggestions you have regarding our tax forms.

Please feel free to [email](#) those comments or suggestions to Amanda Degenhardt, Income Tax Specialist.

Contact us

Visit us online at revenue.mt.gov or call us toll-free at (866) 859-2254 (in Helena, 444-6900).

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edited by [Ted Brewer](#)

Montana Tax News You Can Use is published weekly during tax season and is for anyone who helps people file taxes and meet their tax responsibility. It keeps you posted on what's happening at the department, lets you know about new ways of preparing and filing taxes and brings you up-to-date on some of the issues and trends popping up during tax season in Montana. To subscribe, please visit www.revenue.mt.gov and click on "sign me up."

We welcome your suggestions and ideas for articles, as well as your questions and comments. Please send them to DORWritingProject@mt.gov.

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