MONTANA DEPARTMENT OF REVENUE

Request for Copies of Tax Information

RTI
V7 5/2026

Clear Form

To request copies of your Montana tax information, fill out all the applicable fields below, sign, and attach the required information. If you are requesting this information on behalf of another taxpayer, you must provide a Power of Attorney Authorization to Disclose Information (Form POA) from the taxpayer. Form POA is available at revenue.mt.gov or on the TransAction Portal (TAP) at https://tap.dor.mt.gov.

Taxpayer Information

1a Name shown on tax return. If a joint return, enter the name shown first.

_____

1b First social security number on tax return, individual taxpayer identification number, or employer identification number.

2 Current Name _____

Current Address _____

City _____ State _____ ZIP _____

3 Previous address shown on the last return filed if different from line 3.

Previous Address _____

City _____ State _____ ZIP _____

4 Taxpayer or Authorized Representative Phone Number

Signature of taxpayer(s)

I declare that I am either the taxpayer whose name is shown on line 1a, or a person authorized to obtain the tax information requested.

IMPORTANT: You must include a proof of signature, such as a copy of your driver's license, state ID card, Social Security Card, etc., with your signed request.

_____ M M D D Y Y Y Y

Taxpayer or Authorized Representative Signature — Date

Information Requested

Year(s) Requested _____

☐ Forms W-2, Forms 1099, or Forms 1098, includes data from these information returns, Montana state information will be included. If you need a copy of these forms, you should first contact the payer. Note that current year information may not be available until six months after the filing period.

☐ Tax Return(s): includes most line items on the Montana Individual Income Tax Return (Form 2). Note that current year information may not be available until six months after the filing period.

  ☐ Include all schedules and supplementals.

☐ Account Status: includes information on the financial status of the account, such as payments made on the account and penalty and interest assessments. Return information is limited to items such as a tax liability, estimated payments, and refundable credit amounts.

☐ Verification of Nonfiling, requesting a letter that confirms that you did not file a return in Montana for the year.

Method to Receive Information

☐ Mail to:

Name _____

Mailing Address _____

City _____ State _____ ZIP _____

☐ Electronically send through Montana File Transfer Service. Enter the email you used to create your Montana File Transfer Service Account. You can create a Montana File Transfer Service Account at transfer.mt.gov.

Email

Send your signed request by mail or fax to:

Montana Department of Revenue
Attn: Request for Tax Information
P.O. Box 5805
Helena, MT 59604-5805

Fax: (406) 444-0750

Questions? Call us at (406) 444-6900, or Montana Relay at 711 for the hearing impaired.