

End of Year Filing Procedures for Surplus Lines

Surplus lines tax payments for the previous calendar year filings are due by April 1st. We request that tax payments not be submitted until after March 2nd when online statements are published.

As the CSI allows a producer a 60 day timeframe to enter all transactions, statements are not finalized until March 2nd. Paper surplus lines filings are no longer accepted. All producers should review their tax statement for accuracy, which may be obtained at: <https://svc.mt.gov/csi/surplus/login.aspx> . after March 2nd.

Zero Premium Filing Forms are not required.

If errors are noted and corrections need to be made to your statement, please contact Pam Daugherty at 406-444-9751 or by email at pdaugherty@mt.gov .

Montana now requires surplus lines tax payment through OptIns at
<https://www.optins.org/>

Please contact Pam Daugherty with filing questions or tax related questions.