

End of Year Filing Procedures for Surplus Lines

Surplus lines tax payments for the previous calendar year filings are due or postmarked by April 1st. We request that tax payments not be sent in 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 allows surplus lines tax payment through OptIns. If you choose to pay by check, please attach the Payment Voucher or the Producer Tax Statement to the payment check. Please include all money owed, premium taxes and fire taxes, on one check. Please make the check payable to:

Montana Commissioner of Securities and Insurance
840 Helena Avenue
Helena, MT 59601

After 2019 filing year, payments will be required through Optins at <https://www.optins.org/>

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