

## 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 2<sup>nd</sup>. 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](mailto:pdaugherty@mt.gov). To request an extension from the April 1 tax payment deadline, please contact Tim Morris at 406-444-4489 or [tmorris@mt.gov](mailto:tmorris@mt.gov).

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

Please contact Pam Daugherty with filing questions and Tim Morris if you have any tax related questions.