



Application for Tax Certificate

1. Applicant Information

Name

Federal Employer Identification Number (FEIN)

Social Security Number (SSN)

Street Address

City State Zip Code Phone

2. Representative Information (Person to whom certificate should be sent, if different from above)

Name

Street Address

City State Zip Code

Contact Person Phone

3. Type of Certificate Requested (Please check only one.)

Table with 5 columns: Title 15, Dissolution/Withdrawal, Reviver, Tax Clearance, Good Standing. Each column contains a checkbox and a description of the certificate type.

4. Entity Activity (Please check only one.)

a. ___ Withdrawing ___ Dissolving ___ Merging ___ Reinstating

b. If merging, please provide the name and FEIN for the surviving entity:

Name of the surviving entity

FEIN of the surviving entity



5. Business Type (Please check only one type.)

C corporation

If domestic corporation, give incorporation date _____

If foreign corporation, give incorporation date _____

Date of Certificate of Authority in Montana _____

Nonprofit (tax exempt) organization (Please complete and attach Tax-Exempt Status Request Form (Form EXPT).)

S corporation

Partnership

Limited liability company

LLC taxed as a partnership

LLC taxed as a corporation

LLC taxed as a sole proprietor

Limited liability partnership

Disregarded entity

Business trust

6. Corporation Information

a. Are you filing a combined Montana tax return? _____ Yes _____ No

b. If yes, enter the name and FEIN shown on the return:

Name _____

FEIN _____

c. If your entity is included in the Montana tax filing of another entity, you need to file an Assumption of Tax Liability (Form ATL). This form is available on our website revenue.mt.gov.

d. Fax number _____, if you would like Form ATL faxed to you.

7. Other Entity Type Information (Please provide a description below.)

8. Signature

Print Name

Title

Signature

Date

Mail application to:

Montana Department of Revenue
Attn: Certificates
PO Box 5805
Helena, MT 59604-5805

Questions?

Please e-mail us at DORTaxCertificates@mt.gov, or call us toll free at (866) 859-2254 (in Helena, 444-6900).

Fax application to: (406) 444-6642



Instructions for Application for Tax Certificate

If the filing of tax returns is necessary before a certificate can be issued, please submit copies of these returns with this form. This will expedite the process.

Nonprofit Organizations

If your organization has registered as a nonprofit organization with the Montana Secretary of State, but has not yet qualified for tax-exempt status with the Montana Department of Revenue, the following information needs to be filed with the Tax-Exempt Status Request Form (Form EXPT) for your organization to establish tax-exempt status and to subsequently receive any certificate:

1. an affidavit stating the purpose of the organization
2. articles of incorporation
3. by-laws
4. financial statements
5. a copy of the IRS letter granting federal tax-exempt status, if available

This form is available on our website revenue.mt.gov.

Certificates – Required by Secretary of State

All certificates are free of charge. If the request is approved, your entity will receive an original certificate along with a copy. Both of these certificates must be submitted to the Montana Secretary of State, Business Services Bureau at the following address:

Secretary of State
Business Services Bureau
P.O. Box 202801
Helena, MT 59620-2801
Phone (406) 444-3665
Website address: sos.mt.gov

Title 15 Certificate (T-15) – To reinstate an entity after it has been involuntarily dissolved by the Secretary of State, all tax returns have to be submitted and all taxes paid prior to the issuance of a certificate by the Department of Revenue. In the event that the entity did not engage in any activity in Montana, the entity can file an Affidavit of Corporate Inactivity (Form INA-CT). This form is available on our website, revenue.mt.gov.

Dissolution/Withdrawal Certificate (DWC) – For purposes of voluntary withdrawal or dissolution with the Secretary of State, Section 15-31-552, MCA provides for a DWC. This certificate verifies that the entity has filed all applicable returns and has paid all taxes owing the State of Montana up to the date of request for dissolution or withdrawal. The entity remains responsible for the filing of a final return upon its withdrawal or dissolution (see TCC under “Optional Certificates”).

Certificate of Reviver – If the Department of Revenue, rather than the Secretary of State, suspended your entity, you will need to request a Certificate of Reviver as well as

a Title 15 Certificate to reinstate your entity. Both of these certificates must be sent to the Secretary of State.

Optional Certificates

Tax Clearance Certificate (TCC) – Upon request by the taxpayer at the time of final withdrawal or dissolution, a TCC can be provided to the entity which verifies that the entity has filed all applicable tax returns with the Department of Revenue. In addition, this certificate confirms that all taxes have been paid through and including the entity’s final year of existence in Montana. This certificate is not required to be filed with the Secretary of State.

Good Standing Certificate – Upon request by the taxpayer, a Good Standing Certificate is available from the Department of Revenue which will serve as confirmation that the entity has filed all tax returns and paid all taxes. This certificate is not filed with the Secretary of State. Instead, it is requested by the taxpayer for verification to outside parties, such as financial institutions, that the taxpayer has no outstanding tax obligation.

Questions?

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