

INDIVIDUAL INCOME TAX REBATE



How much is the rebate?

The rebate amount depends on an individual's 2021 tax filing status and the amount reported on line 20 of their 2021 Montana Individual Income Tax Return (Form 2).

- ✓ If you filed married filing jointly, the rebate is \$2,500 or the amount reported on line 20, whichever is less
- ✓ If you filed single, head of household, or married filing separately, the rebate is \$1,250 or the amount reported on line 20, whichever is less

What are the qualifications?

To qualify for the rebate, you must meet the following criteria:

- ✓ You filed a 2021 Montana resident tax return by October 17, 2022
- ✓ You filed a 2020 Montana resident or part-year resident tax return by October 17, 2022
- ✓ Line 20 of your 2021 Montana tax return has an amount greater than zero
- ✓ You weren't claimed as a dependent on another taxpayer's 2021 tax return
- ✓ For rebate consideration, amended 2021 returns must have been filed by May 1, 2023

When and how will I receive my rebate?

The Montana Department of Revenue will begin issuing rebates to eligible taxpayers in July 2023. All rebates will be issued by December 31, 2023, using the banking information provided on your most recently filed Montana Form 2.

Beginning June 15, 2023, you may check your rebate eligibility and amount by visiting our TransAction Portal (tap.dor.mt.gov) and clicking on "Where's My Rebate?"

For more information on the individual income tax rebates, visit:

GETMYREBATE.MT.GOV

Montana Department of Revenue



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