
ULTRATAX CS™

MT

MONTANA STATE PRODUCTS

The UltraTax CS programs for Montana work together with the federal UltraTax CS programs, reducing state tax return preparation to a few keystrokes—and a few short minutes.

By taking full advantage of the integration capabilities of CS Professional Suite, your firm can reach maximum efficiency, productivity, and accuracy.

UltraTax CS state programs automatically capture all appropriate federal data and calculate the state tax results. You enter data only once to complete both returns, simply and efficiently.

The Montana line-up for UltraTax CS includes the Montana Individual, Corporate, Partnership, and Fiduciary programs.

UltraTax/1040

Multi-state processing

UltraTax/1040 has extensive multi-state processing capabilities with the ability to process several states from one set of federal data.

Montana Individual

Montana Forms and Schedules

Form 2—Montana Individual Tax Return and Supporting Schedules
Form 2EC—Elderly Homeowners/ Renter Credit
Form 2441M—Montana Deduction for Child and Dependent Care Expenses
Form AFCR*—Alternative Fuel Credit
Form AMD—Individual Tax Amended Reconciliation
Form CC—College Contribution Credit
Form DCAC*—Dependent Care Assistance Credit
Form DS-1—Calculation of Disability Income Exclusion
Form ECC—Elderly Care Credit
Form ENRG-A*—Geothermal System Credit
Form ENRG-B*—Alternative Energy System Credit
Form ENRG-C—Energy Conservation Installations Credit
Form ESA—Annualization Worksheet
Form EST-I—Underpayment of Estimated Tax by Individuals
Form ESW—Montana Individual Income Tax Estimated Tax Worksheet
Form EXT—Extension Payment Worksheet
Form FRM*—Montana Farm and Ranch Risk Management Account
Form FTB—First Time Buyer Savings Account

STATE PRODUCT PROFILE

- Montana Individual
- Montana Corporate (includes S Corp)
- Montana Partnership
- Montana Fiduciary

Form FTB-P—First Time Buyers Penalty Calculation
Form HI—Health Insurance for Uninsured Credit
Form IND*—Indian Certification
Form IT—Current Year-Montana Individual Income Tax Payment Coupon and Estimated Payments
Form MSA—Medical Savings Account
Form MSA-P—Medical Savings Account Penalty Calculation
Form MT 8582—Passive Activity Loss Limitation Worksheet
Form NOL—Montana Net Operating Loss
Form NR-1*—North Dakota Reciprocal Affidavit
Form NR-2*—Employee Certificate of North Dakota Residence
Form POA—Power of Attorney
Form QEC*—Qualified Endowment Credit
Form RCYL*—Recycling Credit/Deduction
Form W, Worksheet II—Tax Benefit Rule
Form W, Worksheet III—Qualifying Capital Gain Exclusion
Form W, Worksheet IV—Pension and Annuity Exclusion
Form W, Worksheet V—Standard Deduction
Form W, Worksheet VI—Itemized Deduction
Form W, Worksheet VIII—Taxable Social Security

MONTANA CORPORATE

Montana Forms and Schedules

Form AEPC*—Alternative Energy Production Credit
Form AFCR*—Alternative Fuel Credit
Form CC*—College Contribution Credit
Form CLT-4—Corporation License Tax Return
Form CLT-4S—Montana S Corporation Information and Composite Tax Return
Form CLT-4-UT—Underpayment of Estimated Tax by Corporations
Form CT—Montana Corporation License Tax Payment Voucher
Form DCAC*—Dependent Care Assistance Credit
Form HI*—Health Insurance for Uninsured Montanans Credit

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*Denotes non-calculating form

**Denotes 1120 Consolidated form

ULTRATAX CS – MONTANA, CONT.

Form PT—Montana Pass-through Entity Tax Payment Voucher
Form PT-AGR—Pass-through Entity Owner Tax Agreement
Form PT-STM*—Second-tier Pass-through Entity Owner Statement
Form PT-WH—Montana Income Tax Withheld for a Nonresident Individual, Foreign C Corporation, or Second-tier Pass-through Entity
Form RCYL*—Recycle Credit/Deduction
Form POA—Power of Attorney Authorization to Disclose Tax Information
Form BBSC*—Biodiesel Blending and Storage Credit
Form ENRG-A*Geothermal System Credit
Form FPC*—Film Production Credit
Form OSC*—Oil Seed Crushing and Biodiesel / Biolubricant Production Facilitate Credit
Form QEC*—Qualified Endowment Credit
Form RSCH*—Increase Research and Development Activities Credit
Form TELC*—Temporary Emergency Lodging Credit

MONTANA PARTNERSHIP

TUltraTax/1065 calculates the apportionment factor for multi-state clients and allows for the allocation of Montana income. The program also calculates Montana composite income tax and back-up withholding for non-resident.

Montana Forms and Worksheets

Form PR-1—Partnership Information and Composite Tax Return
Schedule I—Apportionment Factors for Multi-state Partnerships
Schedule II—Montana Partnership Tax Credits
Schedule III—Montana Partnership Information
Schedule IV—Montana Partnership Composite Income Tax Schedule
Schedule V—Pass-Through Entity Backup Withholding Schedule
Schedule VI—Reporting of Special Transactions
Form AEPC*—Alternative Energy Production Credit
Form AFRC*—Alternative Fuel Credit
Form BBSC*—Biodiesel Blending and Storage Credit
Form CC*—College Contribution Credit
Form DCAC*—Dependent Care Assistance Credit
Form ENRG-A*—Geothermal System Credit
Form FPC*—Film Production Credit
Form HI*—Health Insurance for Uninsured Montanans Credit

Form OSC*—Oil Seed Crushing and Biodiesel / Biolubricant Production Facilities Credit
Form POA—Power of Attorney (POA)—Authorization to Disclose Tax Information
Form PT—Pass-through Entity Tax Payment Voucher
Form PT-AGR—Pass-through Entity Owner Tax Agreement
Form PT-STM*—Second-Tier Pass-through Entity Owner Statement
Form PT-WH—Montana Income Tax Withheld for a Nonresident Individual, Foreign C Corporation or Second-Tier Pass-through Entity
Form QEC*—Qualified Endowment Credit
Form RCYL*—Recycle Credit/Deduction
Form RSCH*—Increase Research and Development Activities Credit
Form TELC*—Temporary Emergency Lodging Credit
Composite Estimated Tax Worksheet
Late Filing Interest and Penalty Worksheets
Partner K-1 Worksheet—Partner’s Share of Adjustments, Credits, and Income Worksheet
Underpayment Penalty Worksheet

MONTANA FIDUCIARY

Multi-state processing

UltraTax/1041 has extensive multi-state processing capabilities with the ability to process several states from one set of federal data.

Montana Forms and Schedules

Form FID-3—Montana Income Tax Return for Estates and Trusts
Form FID—Estate or Trust Tax Payment Voucher
Form AFRC*—Alternative Fuel Credit
Form CC*—College Contribution Credit
Form ENRG-B*—Alternative Energy System Credit
Form EST-I—Underpayment of Estimated Tax by Individuals and Fiduciaries
Form NOL*—Montana Net Operating Loss
Form POA—Power of Attorney (POA)—Authorization to Disclose Tax Information
Schedule K1—Beneficiary’s Share of Income, Deductions, Credits, etc.
Grantor / Agency Report—Grantor’s Share of Income Deductions, Credits, etc.

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ULTRATAX CS – MONTANA, CONT.

SUPPORT

You receive the same toll-free access to the Thomson Reuters Support HelpLine for state and local UltraTax CS products as you do for your federal UltraTax CS products.

MONEY-BACK GUARANTEE

All Thomson Reuters software is backed with a written money-back guarantee. If you are not completely satisfied with any fully licensed UltraTax CS product, return the software within the specified period for a refund.

PER-RETURN PRICING (PRP)

For your convenience, all UltraTax CS software is available on a per-return basis. UltraTax PRP offers a cost-effective way to handle states and entities that require a limited number of returns.

MORE INFORMATION

UltraTax CS products for Montana are just part of the family of more than 150 UltraTax CS state and local programs. For more information, please call a Thomson Reuters Account Representative at **800.968.8900**.

