



Request for Copies of Tax Information

RTI
V3 1/2022

It is important that you provide all information requested so that we can process your request. We will contact you if additional information is required.

Taxpayer Name (please print) _____

Social Security Number (SSN) or Federal Employer Identification Number (FEIN) _____

Phone Number _____

Step 1. Request Tax Information

☐ W-2(s) ☐ Tax Return(s) ☐ Other, specify _____

Year(s) Requested _____

You can request copies of your Montana schedules and documents. We will send these supporting documents to you, provided we have them in our records.

☐ Check this box if you need the supporting documentation for the year(s) requested above.

Required ► Signature of taxpayer or Power of Attorney _____

If you are authorizing another individual to obtain your tax information, please complete a Power of Attorney form. The form is available at MTRevenue.gov.

Required ► Proof of signature (copy of driver's license, state ID card, social security card, etc.)

Step 2. Send Your Request

You may mail or fax your signed request and proof of signature.

Montana Department of Revenue
Attn: Request for Tax Information
PO Box 5805
Helena, MT 59604-5805
Fax: (406) 444-6642

Step 3. Receive Your Information

We can mail, fax or send requested information to you electronically. Please check the box to indicate your preference and provide the necessary information.

☐ Mail to _____

☐ Fax to _____

☐ Email to _____

(This is the email address used to create your Epass Montana account. We cannot email your information unless you have an Epass Montana account. You can create an Epass account at transfer.mt.gov.)

Questions? Call us at (406) 444-6900, or Montana Relay at 711 for the hearing impaired.