

COMMISSIONER OF SECURITIES & INSURANCE

MONICA J. LINDEEN
COMMISSIONER



OFFICE OF THE MONTANA
STATE AUDITOR

MEMORANDUM

TO: Surplus Lines Agent
From: Rosann Grandy
RE: End of Year Filing Procedures
Date: January 10, 2011

Surplus lines tax payments for calendar year 2010 surplus lines filings are due on April 1, 2011. All agents are required to file a statement with Montana Insurance Department even if no premiums have been written in Montana. A zero-premium filing form can be obtained at <http://sao.mt.gov/Surplus%20Lines/surpluslines.asp>.

Surplus lines agents have until March 2, 2011 to electronically file outstanding 2010 surplus lines filing. Paper surplus lines filings must be postmarked by March 2, 2011. All agents should review their 2010 tax statement, which may be obtained at <http://sao.mt.gov/Surplus%20Lines/surpluslines.asp> for accuracy. If errors are noted and corrections need to be made to your statement, please contact Kim Benjamin at 406-444-3897 or by email at kbenjamin@mt.gov. If you need an extension to the April 1 tax payment deadline, please contact Kim Benjamin or Tim Morris at 406-444-4489 or tmorris@mt.gov.

As a reminder, agents are required to send a copy of the agent tax statement and one check that includes premium taxes, fire taxes and stamping fees, made out to the:

Montana Commissioner of Insurance
840 Helena Avenue
Helena, MT 59601

Please let contact Kim Benjamin or Tim Morris if you have any questions.