



# REQUEST FOR REFUND

Office Use  
Only

P.O. Box 201430 Helena, MT 59620-1430 • Phone (406) 444-0295 • Fax (406) 444-2086 • [www.doj.mt.gov/driving](http://www.doj.mt.gov/driving)

Legal Name/Business Name: _____	
Check appropriate box for federal tax classification (required):	
<input type="checkbox"/> Individual/Sole Proprietor <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> Limited Liability Company. Enter the tax classification (C=C Corporation, S=S Corporation, P=Partnership) ▶ _____ <input type="checkbox"/> Other (see instructions) ▶ _____	<input type="checkbox"/> Exempt Payee
Residential/Business Address: _____	
City	State      Zip Code
Mailing Address: _____	
City	State      Zip Code
Phone No: _____	Email Address: _____
Driver License No. (if applicable): _____	Date of Birth: _____
Social Security, Tax Identification, or Federal Employer Identification No.: _____	

I request a refund in the amount of \$ \_\_\_\_\_ for receipt no. \_\_\_\_\_

Reason for Request: \_\_\_\_\_

For the purposes of obtaining the refund claimed, I affirm that under penalty of law (MCA 45-7-203 Unsworn Falsification to Authorities) the statements made on this form are true and correct to the best of my knowledge, information and belief, and if signing for a commercial entity, I have full authority to do so.

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS had notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (defined below).

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. See the instructions on page 2.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_

### NOTICE

**No refund will be made unless:**

- **The original receipt (system-generated) is enclosed with this refund request. A copy of your receipt may be obtained from the Title and Registration Bureau, County Treasurer Office, or Driver Exam Station, whichever entity initially printed your receipt.**
- **For refunds of fees paid using the online Vehicle Registration Renewal Service, the original tabs must be included with your application for refund.**
- **Include any other documentation that will support your refund request.**

### FOR OFFICE USE ONLY:

I approve the above refund in the amount of \$ \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Printed Name: \_\_\_\_\_

# Request for Taxpayer Identification Number (TIN) Instructions

The TIN provided must match the name given on the "Name" line to avoid backup withholding. For individuals, this is your Social Security Number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Department of the Treasury Internal Revenue Service guidelines for Form W-9. For other entities, it is your Employer Identification Number (EIN).

## General Instructions

Use this form only if you are a U.S. person (including a resident alien) to provide your correct TIN and to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

**Definition of a U.S. person.** For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Internal Revenue Code Regulations section 301.7701-7).

**Special rules for partnerships.** Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.