



Montana Legislative Branch

Financial Office

PO BOX 201706
Helena, MT 59620-1706
(406) 444-3064

Legislator Primary Amount for Constituent Services Opt-In Form

The following form is provided for you to opt in or out of the **PRIMARY** Constituent Services stipend (\$3,000 before taxes) or choose to take an allowance (distributions on a reimbursable basis) as provided for in 5-2-204 (1), MCA, and amended by the 68th Legislature's House Bill 150 (included below as "Attachment A"). The primary \$3,000 may be used for providing constituent services which include, but are not limited to:

- Unreimbursed expenses for mileage, per diem (meals), or lodging
 - Mileage and meals do not require a receipt to be reimbursed
 - Lodging, air travel, and "other expenses over \$25" require receipts
- The following are also reimbursable expenses, but individual requests over \$25 require receipts
 - Telecommunications or phone, internet, computer hardware and software
 - Postage
 - Education-related expenses
- If you choose the stipend option, the payment is treated as taxable income and will be included on your W-2 at the end of calendar year in which it is paid. However, the legislator may be able to claim certain expenses as deductions for federal income tax purposes.
 - This payment can affect taxes and Social Security income, especially in the calendar year that legislators receive session salary. Legislative Financial Office is offering the following options.

Please choose one of the three following choices.

I would like to receive the \$3,000 as a reimbursable **allowance**. While some reimbursements may still be taxed, certain reimbursements are not taxable with proper documentation and certain requirements met. The Legislative Financial Office will process reimbursements as legislators submit documentation. **This election form must accompany the first reimbursement request (per the 68th Legislature's House Bill 150 amending 5-2-204, MCA).**

I would like to receive the \$3,000 minus taxes as a stipend and have it included as income for the calendar year in which it was distributed. You may take the stipend in a lump sum or in installments of your choice (ex. \$500/month in calendar year 2024). Please indicate below the month, year, and monthly amount (if applicable) that the Legislative Financial Office is to distribute the primary \$3,000.

LUMP SUM:

MONTH TO DISTRIBUTE

CALENDAR (TAX) YEAR

MONTHLY INSTALLMENTS:

MONTH TO BEGIN DISTRIBUTIONS

CALENDAR (TAX) YEAR

AMOUNT

Statute allows a legislator to take the \$3,000 (minus taxes) primary amount as a stipend or allowance in numerous combinations, please contact Dan Messerli (406) 444-4456 or Angie Carter at (406) 444-4380 with any questions or to discuss variations accepted.

Signature

Date

Printed Name

FORM SUBMISSION INSTRUCTIONS:

After completing this form, save the file and email it as an attachment (**from your legmt.gov email address**) to legfinservices@legmt.gov.