3 4 5 6 7		1	Montana Department of REVENUE					MONTAN Nexus Rev 06 19		1 2 84 3 4 5 6 7
8				Nexus Que	estionnaire					8
9				15-31-101 MCA a	nd ARM <u>42.26.501</u>					9 10
11										11
12	Ple	ease	do not simply assert the lac	k of nexus under F	Public Law 86-27	2 when comp	leting this	questior	nnaire.	12
13	Dic	d you	company receive a letter from the	Department of Revenue	?					13
14		Yes	Letter ID Departi	nent of Revenue Repre	sentative			E	D No	14
15 16		+++	t tax periods are you completing thi							15 16
17				S NEXOO questionnaire						17
18			Entity Information							18
19	Le	egal N	ame of Business		Contact Person					19
20 21										20
22	Do	oing E	Business As Name		Contact Phone					22
23	L									23
24	St	reet /	Address		Contact Email					24
25 26	Ш									25 26
27	Ci	ty/Sta	ite/ZIP		Business Web Addr	ess				27
28										28
29	Fe	edera	Employer Identification Number		Date of Formation/Inco	orporation State or	Country of Forr	nation/Incor	poration	29
30						IY Y				30
31 32	Mo	ontan	a Secretary of State ID Number		Period End Date	Date Bu	ısiness Begar	Activity in	MT*	31
33						M	MBBY			33
34	Or	rganiz	ration Type (mark one)		Federal Tax Return	Type (mark one)				34
35	l a.		C Corporation e. LLC		a.	d. 🗖	Form 1040			35
36 37	b.	$+ \mathbb{H}$	_	arded Entity	(C, F, L, REIT,		(Schedule C, E	or F)		36 37
38	D.	$\top \top $			b.	S e. 🔲	Form 1041			38
39	C.	Ш	Partnership g. 🔲 Sole F	Proprietorship	c. Form 1065	f []	Filing under	parent		39
40	d.		Trust If you selected e, f, or g, lis	t owners below.	$\parallel \parallel \parallel \Box \parallel \parallel$	f you selected f, al			v'e	40
41 42			SSN/FEIN			eturn type and list			yS	41 42
43						EIN				43
44			Name							44
45						Name				45
46 47	* If y	you ha	ve not yet begun to do business in Montana, ple	ease state so and answer the re	st of the questionnaire acco	ording to how the com	pany plans to do l	ousiness in Mo	ontana.	46 47
4 <i>1</i> 48			Overall Business Informat							48
49	,					4(49
50	1.	⊨xp	lain the nature of your overall busin	ess and give a description	on or the property an	u/or services sol	a.			50
51	+	+++							++-	51
52 53	+	++								52 53
54	2.	Plea	ase indicate all applicable business	categories. If you don't f	all into any listed cat	egories, check o	ther and spec	cify.		54
55		Ы	Airling	mohico	Tologommunication					55
56		Ч		anchise	Telecommunication	3				56
57 58	+	Щ	Broadcasting	and Gas	Trucking					57 58
59	+		Construction	ilroad	Other (Specify)					59
60			Financial Institution Se	rvice Provider						60
61										61
62 63	+									62
63 64	+								Page 1	63 64
- 1	\rightarrow	\perp							i ayt I	-

2 3 4	5 6 7	7 8 9 10 11 12 13 14	15 16 17 18 19 20 21 22 23 2	42526272829303132333	34 35 36 37 38 39 40 41 42 43 44	45 46 47 48 49 50 51 52 53 54 55 56 57	750500004000004050007		81 2 848
							7 30 39 00 0 1 02 03 04 03 00 07 (68 69 70 71 72 73 74 75 76 77 78 79 80	0 1 Z 040
3									3
4	3.	List all the s	tates in which you	u conduct business	s activities.				4
5									5
6									6
7	4.	Status of yo	ur business, (mar	k one box).					7
8									8
9		Active	■ Dormant	☐ Dissolved [Non Survivor of	Merger	pecify)		9
10	5.	Are you the	survivor of a mero	ger with another h	usiness that was fo	rmerly a Montana taxpa	aver?	Yes No	10
11									11
12		If yes, provi	de the date of the	merger, and the n	ame and FEIN of t	he surviving and non-su	ırviving businesses	•	12
13		Date	Survivor's	Name	FEIN				13
14		N			FEIN				14
15		Non-Sur	viving Business N	ame	FEIN				15
16	6.	In the past 5	years, did the bu	isiness have any ເ	inrelated business	income reportable on F	ederal Form 990-T	? 🖵 Yes 🖵 No	16
17	7.	Enter the ne	t income (hefore n	et operating loss s	and special deduction	ons, i.e., Line 28) on you	ır federal tav return	for the last five years	17
18	- / -	Litter the ric	t moorie (beloie i	ict operating 1033 e	and special deduction	5113, 1.C., LITIC 20) OIT you	i icuciai tax ictuiii	ioi inc last iive years.	18
19		Tax	Year End Date	Net Inco	ome				19
20									20
21	+	a MIMI	<u> </u>	\$					21
22	+	b M M	D D Y Y Y Y	\$					22
23	+			-					23
24	+	C MIMI	V 1 V 1 I I I I I I I I I I I I I I I I	\$					24
25	+	d ivi ivi	D D Y Y Y Y	\$					25
26	+	e MM							26
27	+	E IVI IVI	<u> </u>	\$					27
28	Ar	nswer all th	e following que	stions as they	relate to the bus	siness's activities in	Montana during	the past five	28
29						aire for detailed exp		• •	29
30						r of the question an			30
31					-				31
32	Pa	art III. Mon	tana Specific	Questions					32
33	1.	Describe yo	ur principal busine	ess activity in Mon	tana				33
34	+								34
35	+	 							
	0								35
.1h	2.				1 9 1 1 1 1 1	, brother/sister corporati	ions, or parent corp	orations engaged in	35 36
36 37	2.			iaries, divisions, d (include additional	1 9 1 1 1 1 1	, brother/sister corporati	ions, or parent corp	orations engaged in	36
37	2.				I pages if needed).	brother/sister corporati	ions, or parent corp	orations engaged in	36 37
37 38	2.	any activitie	s within Montana	(include additional	I pages if needed).		ions, or parent corp		36 37 38
37 38 39	2.		s within Montana	(include additional	I pages if needed).		ions, or parent corp		36 37 38 39
37 38 39 40	2.	any activitie	s within Montana	(include additional	I pages if needed).		ions, or parent corp		36 37 38 39 40
37 38 39 40 41	2.	any activitie a. b.	s within Montana	(include additional	I pages if needed).		ions, or parent corp		36 37 38 39 40 41
37 38 39 40 41 42	2.	any activitie	s within Montana	(include additional	I pages if needed).		ions, or parent corp		36 37 38 39 40 41 42
37 38 39 40 41 42 43	2.	any activitie a. b.	s within Montana	(include additional	I pages if needed).		ions, or parent corp		36 37 38 39 40 41 42 43
37 38 39 40 41 42 43	2.	any activitie a. b. c. d.	s within Montana	(include additional	I pages if needed).		ions, or parent corp		36 37 38 39 40 41 42 43
37 38 39 40 41 42 43 44 45	2.	any activitie a. b.	s within Montana	(include additional	I pages if needed).		ions, or parent corp	FEIN	36 37 38 39 40 41 42 43 44 45
37 38 39 40 41 42 43 44 45 46	3.	any activitie a. b. c. d.	s within Montana Name	(include additional Relations	I pages if needed).	Address	ions, or parent corp		36 37 38 39 40 41 42 43 44 45
37 38 39 40 41 42 43 44 45 46 47		any activitie a. b. c. d. e. Do any relat	s within Montana Name ted entities listed i	(include additional Relations)	I pages if needed). ship re engage in activit	Address ies in Montana?	ions, or parent corp	FEIN	36 37 38 39 40 41 42 43 44 45 46 47
37 38 39 40 41 42 43 44 45 46 47 48		any activitie a. b. c. d. e. Do any relat	s within Montana Name ted entities listed in the complete this quantum series.	(include additional Relations not this questionnal uestionnaire for ea	I pages if needed). ship re engage in activit ach related entity w	Address ies in Montana?	ions, or parent corp	FEIN PEIN PEIN No	36 37 38 39 40 41 42 43 44 45 46 47
37 38 39 40 41 42 43 44 45 46 47 48		any activitie a. b. c. d. e. Do any relat	s within Montana Name ted entities listed in the complete this quantum series.	(include additional Relations not this questionnal uestionnaire for ea	I pages if needed). ship re engage in activit	Address ies in Montana?	ions, or parent corp	FEIN	36 37 38 39 40 41 42 43 44 45 46 47 48
37 38 39 40 41 42 43 44 45 46 47 48 49 50		any activitie a. b. c. d. e. Do any relatifyes, pleas	s within Montana Name ted entities listed in the complete this quarted entity e	n this questionnairuestionnaire for ea	re engage in activite ach related entity wana income tax ret	ies in Montana? ith Montana activity. urns?		FEIN PEIN PEIN No	36 37 38 39 40 41 42 43 44 45 46 47 48 49
37 38 39 40 41 42 43 44 45 46 47 48 49 50 51		any activitie a. b. c. d. e. Do any relatifyes, pleas Have you of	s within Montana Name ted entities listed if the complete this quarter a related entity ende the date of the	n this questionnairuestionnaire for ea	re engage in activite ach related entity wana income tax rete name and FEIN	Address ies in Montana?		FEIN PEIN PEIN No	36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51
37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52		any activitie a. b. c. d. e. Do any relatifyes, pleas	s within Montana Name ted entities listed in the complete this quarted entity e	n this questionnairuestionnaire for ea	re engage in activite ach related entity wana income tax ret	ies in Montana? ith Montana activity. urns?		FEIN PEIN PEIN No	36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52
37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53		any activitie a. b. c. d. e. Do any relatifyes, pleas Have you of	s within Montana Name ted entities listed if the complete this quarter a related entity ende the date of the	n this questionnairuestionnaire for ea	re engage in activite ach related entity wana income tax rete name and FEIN	ies in Montana? ith Montana activity. urns?		FEIN PEIN PEIN No	36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53
37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54		any activitie a. b. c. d. e. Do any relatifyes, pleas Have you of	s within Montana Name ted entities listed if the complete this quarter a related entity ende the date of the	n this questionnairuestionnaire for ea	re engage in activite ach related entity wana income tax rete name and FEIN	ies in Montana? ith Montana activity. urns?		FEIN PEIN PEIN No	36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54
37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55		any activitie a. b. c. d. e. Do any relatifyes, pleas Have you of	s within Montana Name ted entities listed if the complete this quarter a related entity ende the date of the	n this questionnairuestionnaire for ea	re engage in activite ach related entity wana income tax rete name and FEIN	ies in Montana? ith Montana activity. urns?		FEIN PEIN PEIN No	36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55
37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56		any activitie a. b. c. d. e. Do any relatifyes, pleas Have you of	s within Montana Name ted entities listed if the complete this quarter a related entity ende the date of the	n this questionnairuestionnaire for ea	re engage in activite ach related entity wana income tax rete name and FEIN	ies in Montana? ith Montana activity. urns?		FEIN PEIN PEIN No	36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56
37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57		any activitie a. b. c. d. e. Do any relatifyes, pleas Have you of	s within Montana Name ted entities listed if the complete this quarter a related entity ende the date of the	n this questionnairuestionnaire for ea	re engage in activite ach related entity wana income tax rete name and FEIN	ies in Montana? ith Montana activity. urns?		FEIN PEIN PEIN No	36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57
37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58		any activitie a. b. c. d. e. Do any relatifyes, pleas Have you of	s within Montana Name ted entities listed if the complete this quarter a related entity ende the date of the	n this questionnairuestionnaire for ea	re engage in activite ach related entity wana income tax rete name and FEIN	ies in Montana? ith Montana activity. urns?		FEIN PEIN PEIN No	36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58
37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59		any activitie a. b. c. d. e. Do any relatifyes, pleas Have you of	s within Montana Name ted entities listed if the complete this quarter a related entity ende the date of the	n this questionnairuestionnaire for ea	re engage in activite ach related entity wana income tax rete name and FEIN	ies in Montana? ith Montana activity. urns?		FEIN PEIN PEIN No	36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59
37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60		any activitie a. b. c. d. e. Do any relatifyes, pleas Have you of	s within Montana Name ted entities listed if the complete this quarter a related entity ende the date of the	n this questionnal uestionnaire for ea	re engage in activite ach related entity wana income tax rete name and FEIN	ies in Montana? ith Montana activity. urns?		FEIN PEIN PEIN No	36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60
37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61		any activitie a. b. c. d. e. Do any relatifyes, pleas Have you of	s within Montana Name ted entities listed if the complete this quarter a related entity ende the date of the	n this questionnal uestionnaire for ea	re engage in activite ach related entity wana income tax rete name and FEIN	ies in Montana? ith Montana activity. urns?		FEIN PEIN PEIN No	36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61
37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62		any activitie a. b. c. d. e. Do any relatifyes, pleas Have you of	s within Montana Name ted entities listed if the complete this quarter a related entity ende the date of the	n this questionnal uestionnaire for ea	re engage in activite ach related entity wana income tax rete name and FEIN	ies in Montana? ith Montana activity. urns?		FEIN PEIN PEIN No	36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62
37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63		any activitie a. b. c. d. e. Do any relatifyes, pleas Have you of	s within Montana Name ted entities listed if the complete this quarter a related entity ende the date of the	n this questionnal uestionnaire for ea	re engage in activite ach related entity wana income tax rete name and FEIN	ies in Montana? ith Montana activity. urns?		FEIN FEIN No Yes No	36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63
37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64	3.	any activitie a. b. c. d. e. Do any relat If yes, pleas Have you of If yes, provid Date	s within Montana Name ted entities listed if the complete this quare determined entity entit	n this questionnail uestionnaire for eaver filed any Mont last return, and th	re engage in activit ach related entity w ana income tax ret e name and FEIN	ies in Montana? ith Montana activity. urns? under which return was	filed.	FEIN FEIN Page 2	36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64
37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64	3.	any activitie a. b. c. d. e. Do any relat If yes, pleas Have you of If yes, provid Date	s within Montana Name ted entities listed if the complete this quare determined entity entit	n this questionnail uestionnaire for eaver filed any Mont last return, and th	re engage in activit ach related entity w ana income tax ret e name and FEIN	ies in Montana? ith Montana activity.	filed.	FEIN FEIN Page 2	36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64

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	6 7	8 9 10 11 12 13 14 15	16171819202122232425262728293031323334353637383940414243444546474849505152535455565758596061626364656667686976	70717	7273	74 75	76 77	78 79 8	8081
3						Ш	Щ		Ш
	5.	Have you or a ı	related entity ever filed any other tax returns in Montana (for example, withholding, lodging, liquor, etc.)′	? 📙] Y	es	Ш	No	\perp
5		a. If ves, provi	ide the type of return, and name and FEIN under which the return was filed (include additional pag	es if	f ne	ede	ed).		+
; '				1	Ш				++
_		Type	Name FEIN FEIN		+	+			++
)		Туре	Name FEIN FEIN	++	+	+			+
)		Type	Name FEIN	++	+	+			
		1.	elated entity have filed withholding returns in Montana, please provide a brief description of position		a di		0 n d		+
2			etated entity have filed withholding returns in Montana, please provide a brief description of position tries, and principal accountabilities of employees.	ж, п	iatu	ne a	anu		+
3		Scope of de	tics, and principal decountabilities of employees.	+		\vdash			$^{+}$
1				#	_	Ħ		#	$\forall \forall$
_	6.		ered with any other Montana state agency (for example, the Department of Labor and Industry	T			Ц		
3		for unemploym	nent insurance or worker's compensation, the State Auditor's Office for premiums tax, etc.)?	🔱	J Y	es		No	
7		If ves, provi	ide the state agency, and name and FEIN under which the business is registered (include additiona	al pa	age	s if	nee	ded)).
3									
)		Agency	Name FEIN						
)		Agency	Name FEIN FEIN			Ш			
		Agency	Name FEIN	$\perp \! \! \perp$	$\perp \! \! \! \! \! \! \! \! \! \! \perp \! \! \! \! \! \! \! \!$	\perp			\perp
2	7			#) v		Ь	No	
3	١.		ner in a partnership which has operations, conducts business or owns property in Montana?		a Ye	5 8	7	INO	
		If yes, provide	the name and FEIN of the partnership with activity in Montana (include additional pages if needed)	+	+	\vdash		
5		Name		+	+	\vdash	\vdash		
i ,	\vdash	Name	FEIN	+	+	+	+		
7 }		Ivaille			+	+			
)		Name	FEINFEIN						+
	Pa	rt IV. Sales/l	Receipts (please see instructions for further clarification on this section)	++	+	+			
					+	H			$^{+}$
)	⊏nt	er amount of sa	ales/receipts for the last five years.	+	+	\vdash			$^{+}$
3	\parallel	Tax Ye	ar End Date Total Everywhere Sales/Receipts Total Montana Sales/Receipts	\forall	+	\sqcap	\Box	+	
				\top		广			
,		a. M.M.D.	\$ S S S S S S S S S						
5		b. MMD		\prod		Ш			
'		c. MMD	STATE OF STA	Ш	\perp				
3				\perp	Ш	\perp			П
		d . MMD		4	\perp	\perp			
		e. MMb		\dashv	\perp	\vdash			\perp
_	4			+	+	+	\vdash		
2	1.		any type of income from sources located in Montana (sales/receipts, fees for services, royalties, licensing fees, etc.)?	#] _{Ye}		d	Na	
} -	\vdash			#	a Y	5 8	7	INO	+
· 5	\perp	If yes, please	specify and answer questions a-d below.	#	+	+	-	#	
;		a. Do vou soli	cit the sales/receipts of tangible personal or real property in Montana?] Y	es		No	+
'	+								+
	+		cit sales/receipts of services or intangible property in Montana?						
	+	c. Do you pro	vide services in Montana?	4] Y	es	Q	No	
	+	d. Did vou sell	I real or intangible property?		Υ	es		No	+
	2			$+ \overline{1}$	+	Ť	T		$^{+}$
	۷.	riease provide	e an explanation of how sales/receipts are made in Montana.	#	\mp	+	H	+	
				#	Ш	丰		#	
		 		\mathbb{F}] Ye		ū	N-	
	0		ceipts to Montana customers been included in another state's sales/receipts factor?		■ Ye	es	7	INO	
	3.	Have sales/red							
	3.	Have sales/red If yes, list the s	state(s).	\perp	4		Ш		-
33	3.		state(s).	\pm					
) 	3.		state(s).						
) 	3.		state(s).						
) })	3.		state(s).						
) 	3.		state(s).						
) 	3.		state(s).						
		If yes, list the s	state(s)					ige 3	3

1							1	1
1 2 3 4	5 6	7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70	71 72	27374	ł 75 76	77 78 79	3081 2	848
3							3	3
4	4.	Are you or any related entities involved in offering vehicle loans, personal loans,	Ь	\ <u></u>		No	4	
5		mortgages, or credit cards to Montana residents?	7	Yes	3 -	■ NO	5	
6		If yes, provide the name and FEIN of those companies and brief description of their business activities.	Ш	Ш.	Ш		6	
7			Ш	\perp			7	
8	E	Liquido sous quatamente in Montane, un vallut transposit their murahane, and a to valur huginada?					8	
9	5.	How do your customers in Montana usually transmit their purchase order to your business?	\perp	_	+-	_	9	
10		a. By mail?	Ш	Yes	3 L	No	1 1 1 1	
12		b. Through your representative?		Yes	s [No	1	
13		c By website/email?	\vdash	Va		No	1;	
14		C. by website/email:	Т	163	_	INO	1	
15		d. Other? (specify)	#	#	#		1:	
16	6.	Do you or any related entities sell products into Montana via catalog sales/receipts or internet sales/receipts?		Yes	s [No	10	
17	7	Do you provide services as a professional service provider (such as a law firm, accounting firm, etc.) in Montana?	\Box	Va		No	1	7
18	1						18	
19	8.	Do you engage in any franchise operations in Montana?		Yes		No	1	
20	9.	Do you license computer software for use in Montana?		Yes	s [No	2	
21	10	. Do you receive payments for the use of trademarks or trade names in Montana?		Ye	Ę	No	2	
22	$\sqcup \sqcup$						2:	
23	11.	. Do you receive royalty payments and/or receipts from other intangibles in Montana?	4	Yes	3 🕒	No	2	
24 25	Pa	art V. Property	+	+	Н		2	
26	Fn	tter the value of your property for the last five years.	-	+	+		2	
27		itel the value of your property of the last live years.		+	+		2	
28		Tax Year End Date Total Everywhere Property Total Montana Property			\top		2	
29					П		2	
30							3	0
31		b. MINITER S \$					3	
32		c. MIMIDIAIYIYIYI s	Ш	$\perp \!\!\! \perp$	Ш		3	
33		d. Will Divivivis	Ш	$\perp \!\!\! \perp$	Ш		3	
34		d.	Н-	\vdash	Ш		3	
35 36		e. MMDDYYYYY \$	+	+	Н		3	
37	1.	Do you now have, or did you at any time have, the following:	+	+	Н		3	
38		a. an office in Montana?	\Box	Yes		No	3	
39						_	3	
40		b. an agency in Montana?		Yes		No	4	
41		c. a warehouse in Montana?		Yes	s [No	4	1
42		d. another place of business in Montana?	Ь	Yes	ء ا	No	4:	2
43			Т				4:	
44		e. If yes to any of the above, provide the location, dates, and nature of business activity.	+	\pm	+		4	
45	2.	Do you or an related entity hold title, or have you or a related entity ever held title, to any real or tangible property	\vdash	+	-		4:	
46		located or used in Montana? (such as merchandise inventory, motor vehicles, office or industrial equipment, land, etc.)?	4	Yes	3 -	J No	41	
47 48	H	If yes, provide the locations and dates.	\perp	\pm	\pm		4	
48	H	a. In whose name was the property licensed or listed for tax purposes? (Include additional pages if needed.)	+	+	+		4:	
50			+	+	+		5	
51		Name	Ħ	+	Ħ	+	5	
52	3.	Do you or any related entity lease or rent (or has it in the past leased or rented) any tangible property or real prop	erty	loc	atec		5	
53		and/or used in Montana (such as warehouse space, motor vehicles, office space, industrial equipment, etc.)?		Yes	s [No	5	3
54		If yes, provide the locations and dates.		II	Ш		5	
55			Ħ	#	\pm		5	
56		a. In what name was the property licensed or listed for tax purposes? (Include additional pages if needed.)	\perp	+	1		5	
57	\square	Name	\perp	\vdash	\perp		5	
58 59	4.	Have you licensed intangible rights for use in Montana or sold real property, services, or intangibles in Montana?		Yer	s E	No	5	
60	١,		Ŧ	++	+		5:	
61	H	If yes, provide the location, dates, and description of property, service, or intangibles.	\pm	+	+-	+	6	
62	5.	Do you now have, or have you ever had, consigned inventory in Montana?	Ш	Yes	s L	J No	6	
63	6.	Did title to any property, located in Montana, remain with you until the contract price was fully paid?		Yes	s [No	6	
64						Page		
1 2 65	5 6	7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70	71 72	27374			308182	83 84 85
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3 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7	Yes No 4
4 7. Do you maintain a security interest in any products sold or located in Montana?	4
5 8. Do you have title to goods present in Montana on trial or approval?	Yes No 5
7 9. Do you have, or have you ever had, company-owned advertising material in Montana?	Yes No 7
8 10. Do you pick up damaged or returned merchandise in Montana from customers in this state?	Yes No 8
9 11. Were any contracts ever executed by you in Montana?	Yes No 9
	10
11 If yes, provide the location, dates and value of contracts. 12 12 Do you contract for the use or right to use any research facility situated in Montana?	11
12 12. Do you contract for the use or right to use any research facility situated in Montana?	13
13. Do you have contracts with third parties to build, install, repair, or service equipment or products	s in Montana? Yes No 14
15 14. Do you provide intrastate or interstate communication service or equipment to Montana busines	sses or residents?. 🖵 Yes 📮 No 15
16 15. Do you have a distribution center located in Montana?	Yes No 16
17 15. Do you have a distribution center located in Montana?	17 Yes No 18
10	
19 17. Do you provide representatives or booths at trade shows in Montana?	Yes No 19 20
21 Part VI. Payroll	21
22 Enter amount of payroll for the last five years	22
23 Tax Year End Date Total Everywhere Payroll Total Montana Pa	ayroll 23 24
25 a. MMDDMYYYY \$	25
26	26
27 b. \$	27
28 C. MMDDMYYYY \$ \$	28
29 d.	29
30 31 e. MMDDMYYM \$	30 31
32	☐ Yes ☐ No 32
33 T. Do you have any employees in the state of Montana?	Yes WNO 33
34 2. Does or did you have any employees or other representatives (resident or non-resident) who	34
35 a. solicit receipts in Montana?	Yes No 35
37 b. perform services in Montana?	Yes No 37
c. perform any other activities or otherwise act on your behalf in Montana?	Yes No 38
39	7 Voc 7 No. 39
40	40
12	41 Vos D No 42
e. received any salaries, wages, fees, or commissions?	43
f. are Montana residents and did not perform any work in the state of Montana?	Yes U No 44
g. have a base of operations in another state, but whose duties include occasional	45
46 calls upon customers or clients in Montana?	Yes No 46
h. If yes to any of the above, provide the name, address, relationship, territory covered, and a c	description of position, nature, and 47 48
scope of duties and principal accountabilities.	49
50	50
51	51
52 53	52
53 54	53 54
55	55
56	56
57	57
58 3. Do you have a standard form or written agreement with employees in Montana?	Yes No 58 59
60 If yes, provide a copy for our review.	60
61	61
62	62
63	63
64 1 2 65 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60	Page 5 64
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4	4	Do or did you use an independent contractor in Montana?		Yes	☐ No	3 4	
5		a. Does the independent contractor represent any other businesses?		Yes	☐ No	5	\perp
6 7	Н	b. Does the independent contractor have to obtain your business' permission to represent another business?			☐ No	7	+
8		5. Do you compensate such representatives or employees by				8	+
9			\blacksquare	Vac	☐ No	9	П
10 11	Н	a. straight commission?			U No	10 11	
12	H	b. salary plus commission?				12	
13		c expense account?		Yes	☐ No	13	
14	Н	d. other? (specify)	+			14 15	
15 16	E	S. Do employees or representatives maintain	\pm			16	
17		a. an in-home office in Montana?		Yes	☐ No	17	
18	Н	(An office is considered in-home if it is located within the residence of the employee or representative.)	+			18	
19 20	H	b. an office other than an in-home office in Montana?		Yes	☐ No	19 20	
21		c. If yes to questions 6(a) or 6(b) answer the following questions.				21	
22	Ш	Do your employees or representatives:	4			22	
23 24	Н	i. List it as a business address?		Yes	☐ No	23 24	
25	H	ii. Receive business calls?			☐ No	25	
26	П	iii Store inventory?			☐ No	26	
27 28			+	103	- 140	27 28	
29	H	If yes, provide the cost of inventory	+		☐ No	29	
30		iv Store samples there?		res	₩ NO	30	
31 32	Н	If yes, provide the cost of samples	+			31 32	
33	H	v. Use office equipment (computer, typewriter, furniture, etc.) supplied by the business?	Ψ	Yes	☐ No	33	
34		If yes, provide the cost of equipment in Montana				34	
35 36	Н	vi. Receive any office expense reimbursement from the business?			☐ No	35 36	
37	H	vii. Maintain books or records for the business?		Yes	☐ No	37	
38		viii. Use the office for any purpose other than soliciting and receiving order from customers	ļ			38	
39	Н	or for transporting orders outside of Montana for acceptance or rejection by the business?	4	Yes	□ No	39	
40 41	7	7. Do employees or representatives engage in any of the following:	+			40 41	
42		a. Receive purchase orders when contacting customers?			☐ No	42	
43	Н	If yes, do they have authority to approve or reject the order?	Ц	Yes	☐ No	43	
44 45	H	b. Accept or secure deposits or down payments?		Yes	☐ No	44 45	
46		c. Investigate or approve credit?		Yes	☐ No	46	
47	H	d. Make on-the-spot sales/receipts of any items carried by them?	Ф	Yes	☐ No	47	
48 49	H	e. Collect installments and/or delinquent accounts?		Yes	☐ No	48 49	
50		f. Repossess the business' products?		Yes	☐ No	50	
51	Ш	g. Authorize credits, warranty adjustments or repairs?			☐ No	51	
52 53	H	h. Accept damaged or returned merchandise from customers?			□ No	52 53	
54			Ī	103		54	
55	П	If yes, do the employees or representatives resell the merchandise to other customers?	\blacksquare	Yes	п	55	
56 57	Н	i. Make adjustments for returned or damaged merchandise?	+		□ No	56 57	
58	H	j. Handle complaints, troubleshoot, or give advice other than transferring to headquarters?			☐ No	58	
59		k. Periodically or occasionally service or repair equipment or property of your customers?	\rightarrow		☐ No	59	
60 61	H	I. Perform any installation or construction work?			☐ No	60 61	
62	\parallel	m. Supervise installation of business' products?			☐ No	62	
63		n. Check inventories of customers or distributors in Montana?		Yes	☐ No	63	
64 2 65	5 4	6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 7	0717	2737475	Page		
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3							3
4		o. Inspect or have the right to inspect the marketing of your products or any use of your trademarks or tradenames?		Yes	☐ No	5	4
5							5
6		p. Plan dealer promotions?					6
7		q. Arrange cooperative advertising agreements with customers?		Yes	☐ No	o	7
8			Ь		□ No		8
9		r. Investigate, recommend, or appoint potential dealers, agents, or distributors of the business?	.Ψ	Yes	UI No)	9
10		s. Call on dealer's customers accompanied by dealer's salesmen?		Yes	☐ No	o	10
11		t Uira train ar aunan ian naraannal2	\Box	Voc	□ No		11
12		t. Hire, train or supervise personnel?					12
13		u. Conduct lectures, films, promoting or demonstrating business' products or service, etc., to a final consumer?	. 4	Yes	U No		13
14	-	v. Conduct training courses or schools for your customers, agents, distributors, etc.?	\Box	Voc	☐ No		14
15		v. Coriduct training courses of schools for your customers, agents, distributors, etc. ?				-	15
16		w. Hold meetings?	.Ψ	Yes	☐ No		16
17		If yes , explain in detail the circumstances, how often the meetings are held and who attends the meetings	-				17
18	-	in you, explain in ordinate of carriers in your and into anothings and modern and anothings	++				18
19		x. Perform engineering, consulting or design functions?		Yes	☐ No		19
20							20
21	-	y. Provide receipts or service manuals to customers, distributors, agents, etc.?					21
22	++	z. Sell, or represent, other lines of merchandise besides yours?		Yes	☐ No		22
23			-				23
24		If yes, explain in detail.		+++			24
25		aa. Engage in any other activities not fully explained by the above questions?	Щ.	Yes			25
26		If yes, explain in detail.	-				26
27		III yes, explain in detail.					27
28	Pa	rt VII. Other Questions	1				28
29	4	Do you maintain a bank account in a bank located in Montana?	Ь	Voc	□ No		29
30	1.						30
31	2.	Do you do any localized advertising (cooperative or otherwise) in Montana?	Щ.	Yes			31
32		If yes, provide the advertising media used.					32
33			Ь			-	33
34	3.	Do you reserve the right to inspect the customer's facilities or the products after delivery?	Щ.	Yes	☐ No		34
35	4.	Do you ever submit bids to potential customers in Montana in which you offer to sell goods or	Ш				35
36		services based upon conditions specified therein?	.0	Yes			36
37							37
38	5.	Do you maintain a sample or display room for more than fourteen (14) days at any one location within Montana during the year?	П	Voc			38
39							39
40	6.	Do you have a toll-free telephone number available for use by Montana residents?	Щ.	Yes	U No		40
41		If yes, please provide.					41
42							42
43	Pa	rt VIII. Industry Specific					43
44	1	Do you provide freight carrying services?		Yes			44
45	' '			.03			45
46		If yes, provide a detailed explanation of the miles traveled in Montana, the trips made into Montana, and					46
47		the number of pickups and deliveries made in Montana for each year.					47
48							48
49	2	Do you or a related entity own an interced in mineral rights in Montana, including intercets in seal oil or actual	Ь	Yes	□ No	\sim	49
50	2.	Do you or a related entity own an interest in mineral rights in Montana, including interests in coal, oil, or natural gas?					50
51	3.	Do you engage in telecommunication activities within Montana?	Щ.	Yes	☐ No		51
52		If yes, please answer the following questions.					52
53						-[]]	53
54		a. Do you rent or own any property, capacity on cell towers, or any fiber-optics?	. 4	Yes	☐ No	וכ	54
55		b. Own or operate any call centers within the state of Montana?		Yes	☐ No		55
56							56
57		c. Offer call services to Montana residents either directly, or through a third party?			□ No	ו	57
58		d. Charge Montana residents for your services? (either on a call-by-call basis, or lump sum basis)		Yes	☐ No		58
59							59
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1	Were you are related entity involved in a clinical trial or chaggestianal study within Montana?		Voo		No	+
4.	Were you or a related entity involved in a clinical trial, or observational study within Montana?		Yes		NO	+
\forall	If yes, please answer the following questions.					+
	a. What were the dates of the clinical trial(s)/observational study(ies)?					
П	b. What was your role in the clinical trial(s)/observational study(ies)?					
5.	Do you engage in railroad activity within Montana?		Yes		No	
	If yes, please answer the following questions.					
Ш				Ь		
Н	Do you own or lease railcars used or located in Montana during the last 5 years?		Yes			
Н	Do you own or lease railcars that were temporarily used by another railroad in Montana in the last 5 years?	🖵	Yes		No	4
6.	Do you engage in airline activities within Montana?	$+\mathbf{n}$	Vac		No	
0.			103	#	NO	
Н	If yes, please answer the following questions.					
Н	a. Do you participate in an interchange program with another participating airline where owned or rented aircra	ft		+		
\forall	is exchanged with other airlines?		Yes	4	No	1
+	b. Do you have flights that originate, or land in the state of Montana?		Yes		No	1
\forall				ō		
\forall	If yes, did you own the aircraft, and employ the crew?					
7.	Do you engage in television, radio, or broadcasting services within Montana?	↓	Yes		No	
П	If yes, please answer the following questions.			\top		
					N-	
	a. Do you have any rented studio space or equipment?					
	b. Do you use the "audience factor" for calculating subscribers for tax purposes?	U	Yes		No	- 2
8.	Is your business a financial institution?		Yes		No	
				I		
Ш	If yes, please answer the following questions.					_;
Н	a. Do you provide loans secured by real property located in the state of Montana?	Ц	Yes		No	
\perp	b. Do you provide loans not secured by real property to Montana residents?	$+\Box$	Yes		No	
Н	c. Do you sell loans to other institutions?			Ч		
Н	d. Do you collect card issuer's reimbursement fees?	🖵	Yes	-0	No	;
+	e. Do you collect fees from merchant discount on either credit card or debit card sales made in the state of Montana	2	Ves	ф	No	
H						1
	f. Do you collect sales/receipts from Montana ATM fees?		Yes	4		Τ.
	g. Do you collect sales/receipts from fees charged to a card holder if their billing address is in Montana?	🗖	Yes		No	1
Н	h. Do you collect loan servicing fees for loans with real property in the state of Montana, or loans to Montana residents	2 🗖	Vac		No	١.
П						٦.
П	i. Do you have sales/receipts from the financial institution's investment assets and activity?		Yes	-0	No	١.
9.	Do you engage in construction services within Montana?		Yes	u	No	
	If yes, please answer the following questions.					
Ш					Ш	
Ш	a. Do you have any contracts in the state of Montana that are longer than one year?		Yes	+		
Ш	b. Do you rent any equipment specifically to complete a Montana contract?		Yes		No	
\sqcup	c. Do you, or have you, hire(d) Montana employees to complete construction contracts?		Yec		No	
Н					.,5	
\mathbb{H}	d. If yes to any of the above, provide the name, site address, job title, description of position, nature and scope	of dut	es, a	and	++	
H	principal accountabilities for these employees	+++	+	+	$+ \square$	- ;
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\mathbb{H}			+	+		
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Form NEXUS

What is the purpose of this form? We use this form to determine whether your Montana activities require you to file a Montana tax return and pay any applicable tax.

What is Public Law 86-272? The federal Interstate Income Act of 1959, also known as Public Law 86-272, prevents a state from imposing an income tax on income derived within the state from interstate commerce if the only business activity within the state is the solicitation of orders for tangible personal property, provided that the orders are approved and filled outside the state. For a state to tax income earned in interstate commerce, it must be able to show a connection – or nexus – between the state and the activities from which the income is derived.

To be exempt from taxation under the protection of Public Law 86-272, a business's activities within Montana must be limited to the solicitation of orders within the state, the orders must be sent outside Montana for approval or rejection, and approved orders must be filled by shipment or delivery from a point outside Montana.

Please note that any Montana sales that are under the protection of Public Law 86-272 remain subject to the throw out rules. These rules apply if a state does not have jurisdiction to impose its net income tax upon the income derived from those sales.

For additional information regarding Public Law 86-272, please refer to sections 42.26.501 through 42.26.511, Administrative Rules of Montana.

Please note: If your activities in the state are not the sale of tangible personal property, you are not protected under the provisions of Public Law 86-272.

Instructions

Please do not simply assert the lack of nexus under Public Law 86-272 when completing the guestionnaire.

We ask that those who are most familiar with the activities associated with each question complete and sign the questionnaire.

If you answer "Yes" to any question on this form, include an explanation along with any other applicable information in the space provided on the last page. Number each explanation to agree with the part and number of the question answered. Please include additional pages if needed.

Part I. Entity Information

Enter all the information pertaining to your entity with Montana activity.

The requirements to obtain a Federal Employer Identification Number (FEIN) are the same for both federal and Montana income tax purposes. Please refer to irs.gov for more information. If you do not have an FEIN, use the owner's FEIN or Social Security Number (SSN).

Organization Type

If you are an LLC, Disregarded Entity or Sole Proprietor list the name and FEIN/SSN of the owner in the space provided under part g.

Federal Tax Return Type

If you are a subsidiary of a parent corporation, list the name and FEIN of the parent corporation in the space provided under part f.

Part II. Overall Business Information

Answer all questions as they relate to your business structure. In question 3, please indicate your overall business category. If there are multiple categories that your business falls into please check all that apply. If you do not fall into any of the listed categories, please check the "other" box and list your business activity.

Part III. Montana Specific Questions

Answer all questions as they relate to your business activity within Montana.

Part IV. Sales/Receipts

Answer the following questions as they relate to your sales/ receipts in Montana during the past five years. Montana statute has changed the terminology of "sales" to "receipts" the term "sales" is interchangeable with "receipts."

Part V. Property

Answer the following questions as they relate to your property in Montana during the past five years.

Part VI. Payroll

Answer the following questions as they relate to your employees in Montana during the past five years. These questions refer only to those employees, sales representatives, and/or independent contractors who perform activities within Montana, regardless of each employee's domicile or office location. Our questions pertain to the employee's physical presence in Montana; they do not pertain to activities performed outside the state. If you have any employees or representatives working in Montana or Montana residents working on your behalf, provide a brief description of their position, nature and scope of their duties and principal responsibilities.

Part VII. Other Questions

Answer the following questions as they relate to your activities in Montana during the past five years.

Part VIII. Industry Specific

Answer all of the questions as they relate to your activities in Montana during the past five years. These questions are very specific. If they do not pertain to your activity please check "no" and skip to the next question.

Mail this form to:

Montana Department of Revenue Business & Income Tax Division P.O. Box 5805 Helena, MT 59604-5805

Questions? Please e-mail us at DORNexus@mt.gov, or call us at (406) 444-6900, or Montana Relay at 711 for hearing impaired.