

MINUTES
MONTANA SENATE
68th LEGISLATURE - REGULAR SESSION
COMMITTEE ON (S) TAXATION

Call to Order: Chair Greg Hertz-R, on March 22, 2023 at 8:33 AM, in 405

ROLL CALL

Members Present: Sen. Greg Hertz, Chair (R)
Sen. Daniel Zolnikov, Vice Chair (R)
Sen. Becky Beard (R)
Sen. Mary Ann Dunwell (D)
Sen. Denise Hayman (D)
Sen. Brad Molnar (R)
Sen. Russel (Russ) Tempel (R)
Sen. Jeremy Trebas (R)

Members Excused: Sen. Jason Ellsworth (R)
Sen. Edith (Edie) McClafferty (D)
Sen. Wendy McKamey (R)
Sen. Shannon O'Brien (D)

Staff Present: Jaret Coles, Research Analyst
Lorna Mason, Secretary

Audio Committees: These minutes are in outline form only. They provide a list of participants and a record of official action taken by the committee. The link to the audio recording of the meeting is available on the Legislative Branch website.

Committee Business Summary:

Hearing & Date Posted:

HB 136 03/18/2023
HB 459 03/17/2023
HB 497 03/17/2023

Executive Action:

SB 110 TO TABLE
SB 258 TO TABLE

SB122 PASS AS AMENDED
SB 145 PASS AS AMENDED

HEARING ON HB 136 - Adopt Montana Revised Unclaimed Property Act

Opening Statement:

08:33:46 Rep. Marta Bertoglio (R), HD 75, opened the hearing on HB 136, Adopt Montana Revised Unclaimed Property Act.

Proponent Testimony:

08:36:06 Derek Bell, Department of Revenue (DOR)

08:45:03 Tracy Morano, Department of Revenue (DOR)

08:47:48 Aimee Grmoljez, Montana Banker's Association (MBA)

Opponent Testimony:

08:48:43 Bob Story, Montana Taxpayer's Association (MonTax)

08:51:27 Peter Harrington, Securities Transfer Association (STA)

08:53:56 Tamara Salmon, Investment Company Institute (ICI)

Informational Witness Testimony:

08:59:07 Jason Lay, Department of Revenue (DOR)

Questions from Committee:

08:59:53 Sen. Mary Ann Dunwell

08:59:58 Tracy Morano, DOR

09:03:18 Sen. Jeremy Trebas

09:03:25 Jason Lay, DOR

09:04:31 Rep. Marta Bertoglio-R

09:04:37 Sen. Denise Hayman

09:05:32 Rep. Marta Bertoglio-R
09:08:33 Tracy Morano, DOR
09:09:57 Sen. Brad Molnar
09:10:28 Tracy Morano, DOR
09:13:31 Derek Bell, DOR
09:15:17 Tracy Morano, DOR
09:17:09 Sen. Mary Ann Dunwell
09:17:24 Jason Lay, DOR
09:19:28 Tracy Morano, DOR
09:19:39 Sen. Becky Beard
09:19:57 Tracy Morano, DOR
09:20:10 Jason Lay, DOR
09:20:25 Sen. Jeremy Trebas
09:20:57 Rep. Marta Bertoglio-R
09:21:53 Sen. Mary Ann Dunwell
09:22:02 Jason Lay, DOR
09:22:41 Chair Greg Hertz
09:22:59 Tracy Morano, DOR
09:23:34 Jason Lay, DOR

Closing Statement:

09:25:24 Rep. Marta Bertoglio (R), HD 75, closed the hearing on HB 136.

HEARING ON HB 459 - Revise filing deadline for intangible land value property tax exemption

Opening Statement:

09:26:22 Rep. Gary Parry (R), HD 39, opened the hearing on HB 459, Revise filing deadline for intangible land value property tax exemption.

Proponent Testimony:

09:28:04 Bryce Kaatz, Department of Revenue (DOR)

Opponent Testimony:

None

Informational Witness Testimony:

None

Questions from Committee:

09:30:07 Sen. Mary Ann Dunwell

09:30:22 Bryce Kaatz, DOR

09:32:46 Sen. Russel (Russ) Tempel

09:32:59 Bryce Kaatz, DOR

Closing Statement:

09:36:15 Rep. Gary Parry (R), HD 39, closed the hearing on HB 459.

HEARING ON HB 497 - Require property tax bill to include comparison with prior year

Opening Statement:

09:37:46 Rep. Fred Anderson (R), HD 20, opened the hearing on HB 497, Require property tax bill to include comparison with prior year.

Discussion:

[EXHIBIT\(230322TASa1\)](#)

[EXHIBIT\(230322TASa2\)](#)

Proponent Testimony:

None

Opponent Testimony:

None

Informational Witness Testimony:

None

Questions from Committee:

09:41:03 Sen. Jeremy Trebas
09:41:07 Rep. Fred Anderson-R
09:41:18 Jaret Coles
09:41:25 Sen. Russel (Russ) Tempel
09:42:37 Rep. Fred Anderson-R
09:42:51 Sen. Becky Beard
09:43:10 Rep. Fred Anderson-R
09:43:30 Sen. Mary Ann Dunwell
09:43:51 Rep. Fred Anderson-R

Closing Statement:

09:44:04 Rep. Fred Anderson (R), HD 20, closed the hearing on HB 497.

09:45:56 **Recessed**

10:11:05 **Reconvened**

10:11:10 SB 122 Do Pass as Amended Committee Vote Yes 8 No 4
10:11:31 SB 145 Do Pass as Amended Vote Yes 7 No 5

**EXECUTIVE ACTION ON SB 110 - Provide property tax assistance to elderly homeowners
by fixing appraised value**

10:15:13 **Motion:** Vice Chair Daniel Zolnikov moved that **SB 110 DO PASS.**
10:15:44 **Motion:** Vice Chair Daniel Zolnikov moved that **SB 110 BE AMENDED.**

Discussion:

- 10:17:32 Chair Greg Hertz
- 11:38:23 **Vote:** Motion carried 11 - 1 by voice vote with Sen. Tempel, voting no.
- 10:19:17 **Motion:** Sen. Mary Ann Dunwell moved that **SB 110 BE AMENDED.**
- Discussion:**
- 10:19:54 Jaret Coles
- 10:21:37 Sen. Denise Hayman
- 10:21:41 Sen. Mary Ann Dunwell
- 11:38:23 **Vote:** Motion failed 7 - 5 by roll call vote with Sen. Dunwell, Sen. Hayman, Sen. McClafferty, Sen. Molnar, Sen. O'Brien, voting yes.
Sen. McClafferty, Sen. O'Brien, By Proxy
- 10:23:07 **Motion:** Vice Chair Daniel Zolnikov moved that **SB 110 DO PASS AS AMENDED.**
- Discussion:**
- 10:23:26 Chair Greg Hertz
- 10:24:16 Sen. Becky Beard
- 10:25:06 Chair Greg Hertz
- 10:25:09 Jaret Coles
- 10:26:19 Sen. Jeremy Trebas
- 10:26:56 Sen. Brad Molnar
- 10:28:15 Sen. Mary Ann Dunwell
- 11:38:23 **Vote:** Motion failed 7 - 5 by roll call vote with Sen. Ellsworth, Sen. Hayman, Sen. Hertz, Sen. McKamey, Sen. Molnar, voting yes.
Sen. Ellsworth, Sen. McKamey, By Proxy
- 10:30:18 **Motion:** Vice Chair Daniel Zolnikov moved that **SB 110 TO TABLE.**
- 11:38:23 **Vote:** Motion carried 10 - 2 by voice vote with Sen. Hertz, Sen. Molnar, voting no.

EXECUTIVE ACTION ON SB 258 - Establish social security income tax credit

- 11:05:32 **Motion:** Vice Chair Daniel Zolnikov moved that **SB 258 DO PASS.**
- Discussion:**
- 11:07:19 Sen. Mary Ann Dunwell

11:07:33 Jaret Coles

11:10:09 **Motion:** Chair Greg Hertz moved that **SB 258 DO PASS AS AMENDED.**

Discussion:

11:10:27 Sen. Mary Ann Dunwell

11:11:31 Jaret Coles

11:12:44 Chair Greg Hertz

11:12:47 Sen. Russel (Russ) Tempel

11:12:54 Jaret Coles

11:15:13 Sen. Mary Ann Dunwell

11:17:19 Vice Chair Daniel Zolnikov

11:17:21 Chair Greg Hertz

11:18:44 Jaret Coles

11:20:22 Vice Chair Daniel Zolnikov

11:22:36 Sen. Jeremy Trebas

11:38:23 **Vote:** Motion tied 6 - 6 roll call vote

11:24:42 **Motion:** Vice Chair Daniel Zolnikov moved that **SB 258 TO TABLE.**

11:38:23 **Vote:** Motion carried 11 - 1 by roll call vote with Sen. Molnar, voting no.

ADJOURNMENT

Adjournment: 11:43:27

Lorna Mason, Secretary

Additional Documents: [EXHIBIT\(230322TASaad\)](#)