



# Revenue Interim Committee

69th Montana Legislature

PO BOX 201706  
Helena, MT 59620-1706  
(406) 444-3064  
FAX (406) 444-3036

## SENATE MEMBERS

BECKY BEARD  
DAVE FERN  
GREG HERTZ  
MIKE YAKAWICH

## HOUSE MEMBERS

LARRY BREWSTER  
ED BYRNE  
VALERIE MOORE  
JAMES REAVIS  
MARK THANE

## COMMITTEE STAFF

MEGAN MOORE, Lead Staff  
JARET COLES, Staff Attorney  
JOLANDA SONGER, Secretary

## AGENDA

**Friday, July 11, 2025**  
**Room 137, State Capitol**

*Agenda times are approximate. Some items may take more or less time than is indicated.*

- 9:30 1. **Call to Order – Roll Call** – Sen. Greg Hertz, Acting Presiding Officer
- 9:35 2. **Revenue Estimating and Monitoring**
- a. Federal tax legislation update – Megan Moore, Committee staff
  - b. FY 2025 General Fund update – Joe Baan, Legislative Fiscal Division
  - c. Public comment\*
  - d. Committee questions and discussion
- 10:15 3. **Administrative Matters**
- a. Introductions of members and staff
  - b. Staff and committee member roles and responsibilities
  - c. Compensation – Maia Zelenak, Legislative Branch Financial Office
  - d. Meeting material preferences
  - e. Rules, procedures, and guidelines for interim committees
  - f. Proxy voting procedures – **Committee action**
  - g. Election of officers – **Committee action**
  - h. Committee website tour
  - i. Summary of Enacted Tax Legislation
- 10:45 4. **Draft Interim Work Plan**
- a. Overview and committee considerations – Megan Moore
    - i. Senate Joint Resolution No. 8
    - ii. Member-proposed study topics
  - b. Public comment\*
  - c. Committee questions and discussion
- 11:30 5. **Agency Monitoring: Montana Tax Appeal Board** – Travis Brown, Chair
- a. Introduction of Board role and members
  - b. Appeals and county tax appeal board trainings updates
  - c. Public comment\*
  - d. Committee questions and discussion
- 12:00 **Lunch**

- 1:00 6. **Agency Monitoring: Department of Revenue** – Brendan Beatty, Director
- a. Introduction of staff
  - b. Reappraisal update – Bryce Kaatz
  - c. 2025 legislation implementation – Derek Bell, Jill Hamilton, Paula Gilbert
  - d. Income tax season update – Jill Hamilton, Derek Bell
  - e. Major case update – Dave Stewart
  - f. IRS audit schedule – Bob Finstad
  - g. Public comment\*
  - h. Committee questions and discussion
- 2:00 7. **Implementation of Property Tax Rebate and Revised Tax Rates**
- a. Overview of 2025 legislation – Megan Moore
  - b. Rebate application process – Derek Bell, Department of Revenue
  - c. Homestead and rental property reduced tax rate implementation – Bryce Kaatz, Jason Roach, and Eric Dale – Department of Revenue
  - d. Public comment\*
  - e. Committee questions and discussion
- 3:00 8. **Agency Monitoring: Administrative Rule Review**
- a. Overview of administrative rule review process – Jaret Coles, Staff attorney
  - b. Administrative rule report
  - c. Public comment\*
  - d. Committee questions and discussion
- 3:20 9. **Modernization and Risk Analysis Committee**
- a. Opportunities for coordination – Nick VanBrown, Legislative Fiscal Division
  - b. Public comment\*
- 3:40 10. **Public comment\*** on any other topic within the committee’s jurisdiction
- 3:50 11. **Committee Work Session**
- a. Work plan decision matrix
  - b. Adopt meeting dates
  - c. Adopt interim work plan
- 4:30 12. **Adjourn**

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The public may attend the meeting and offer public comment in the Capitol or provide public comment either using remote meeting technology or in writing.

**To offer public comment** via remote meeting technology, please submit the online form for remote participation at least 2 hours before the scheduled start of the meeting: <https://participate.legmt.gov/>.

**Written public comment** may be submitted either through the [online form](#) for written comment or by mailing the comments to Revenue Interim Committee, PO Box 201706, Helena, MT 59620.

*\*Public comment provided in person or remotely at a legislative meeting is a public record that is videotaped, archived, and available on the internet. Public comment submitted in writing at a meeting is a public record that will be posted to the legislative website as part of the minutes log for the meeting.*

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