A Survey on Issues that Impact Montana Adults Age 45 and Older

**TAXATION ON SOCIAL SECURITY INCOME**

Montana is one of only 12 states that still taxes Social Security income

Three in four (77%) find it extremely or very important that Montana legislators work to offer a state income tax exemption or reduction in the tax rates for Social Security income

<table>
<thead>
<tr>
<th>Party</th>
<th>Support Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Democrat</td>
<td>32%</td>
</tr>
<tr>
<td>Republican</td>
<td>52%</td>
</tr>
<tr>
<td>Libertarian</td>
<td>47%</td>
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</tbody>
</table>

Two in five (41%) would support a state income tax exemption or reduction even if it meant cutting senior or other state services

**PROPERTY TAXES**

Montana adults age 45+ want property tax relief

70% Registered voters age 45+ in Montana support property tax circuit breakers

64% Believe it is extremely or very important that Montana state legislators work to offer significant property tax relief in the next legislative session

48% Spend over $2,000 on property taxes each year

**INDEPENDENT LIVING AND LONG-TERM CARE**

Independent living and long-term care is a priority issue, with the following being important to Montana adults age 45+:

- Staying in your own home as you get older: 85%
- Getting to places you need to go independently: 84%
- Being able to afford the costs of owning and maintaining your home: 83%
- Having high quality long-term care in your community: 76%
- Having affordable housing options in your community: 72%
- Staying in your community as you get older: 70%
- Having flexibility in your schedule to care for a loved one: 67%

**Note:**

1. “For the following list of issues, please indicate how important each is to you personally.” % “extremely important” or “very important”
# Vital Voices

## Fast Facts of the 45-Plus

### Age
- 45 to 49: 9%
- 50 to 64: 46%
- 65+: 44%

### Education
- Some college or less: 60%
- 4-year college degree: 22%
- Post-graduate study or degree: 18%

### Gender
- Female: 51%
- Male: 49%

### Caregiver Status
- Current: 17%
- Past: 47%

### Political Views
- Conservative: 44%
- Moderate: 32%
- Liberal: 18%

### Political Party
- Republican: 39%
- Democrat: 27%
- Libertarian: 4%

### Employment
- Full-time: 33%
- Part-time: 10%
- Retired: 47%

### Annual Household Income
- Less than $50,000: 47%
- $50,000 to less than $100,000: 29%
- $100,000+: 17%

### Race/Ethnicity
- White/Caucasian: 94%
- American Indian/Alaska Native: 3%
- Hispanic/Latino: 2%
- Black/African American: 3%
- Other: 2%

### Marital Status
- Married/living with partner: 59%
- Divorced/separated: 18%
- Widowed: 12%
- Never married: 10%

### Other
- Registered to vote: 93%
- AARP Member: 32%
- Veteran: 20%
- LGBTQ: 2%
- Disabled: 30%

For more information, contact state specific advisor: Aisha Bonner Cozad, PhD, ABonner@aarp.org
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