
ULTRATAX CS™

CA

CALIFORNIA STATE PRODUCTS

The UltraTax CS programs for California work together with the federal UltraTax CS programs, reducing state tax return preparation to a few keystrokes—and a few short minutes.

By taking full advantage of the integration capabilities of CS Professional Suite, your firm can reach maximum efficiency, productivity, and accuracy.

STATE PRODUCT PROFILE

- California Individual
- California Corporate (includes S Corp)
- California Partnership
- California Property Tax
- California Fiduciary
- California Estate
- California Exempt

UltraTax CS state programs automatically capture all appropriate federal data and calculate the state tax results. You enter data only once to complete both returns, simply and efficiently.

The California line-up for UltraTax CS includes the California Individual, Corporate (including S Corp), Partnership/LLC, Fiduciary, Estate, and Exempt Organization programs (including private foundations).

ULTRATAX/1040

Multi-state Processing

UltraTax/1040 has extensive multi-state processing capabilities with the ability to process several states from one set of federal data.

CALIFORNIA INDIVIDUAL

California Forms and Schedules

- Form 540—California Resident Income Tax Return
- Form 540-ES—Estimated Tax for Individuals
- Form 540-NR—California Nonresident or Part-Year Resident Income Tax Return
- Form 540-V—Payment Voucher for 540 Returns
- Form 540-X—Amended Individual Income Tax Return
- Form 568—Limited Liability Company Return of Income
- Form 3501—Employer Child Care Program/Contribution Credit
- Form 3503*—Natural Heritage Preservation Credit
- Form 3506—Child and Dependent Care Expenses Credit
- Form 3507*—Prison Inmate Labor Credit
- Form 3510—Credit for Prior Year Alternative Minimum Tax—Individuals or Fiduciaries
- Form 3511*—Environmental Tax Credit
- Form 3516*—Request for Copy of Personal Income Tax or Fiduciary Return
- Form 3519 (PIT)—Payment for Automatic Extension for Individuals
- Form 3527—New Jobs Credit

- Form 3885L—Depreciation and Amortization
- Form 3536—Estimated Fee for LLCs
- Form 3588—Payment Voucher for LLC e-filed returns
- Form 3520—Power of Attorney
- Form 3521—Low-Income Housing Credit
- Form 3522—LLC Tax Voucher
- Form 3523*—Research Credit
- Form 3526—Investment Interest Expense Deduction
- Form 3533—Change of Address
- Form 3537—Payment for Automatic Extension for LLCs
- Form 3540—Credit Carryover Summary
- Form 3546*—Enhanced Oil Recovery Credit
- Form 3547*—Donated Agricultural Products Transportation Credit
- Form 3548*—Disabled Access Credit for Eligible Small Businesses
- Form 3553—Enterprise Zone Employee Credit
- Form 3567—Installment Agreement Request
- Form 3582—Payment Voucher for Individual e-filed Returns
- Form 3800—Tax Computation for Children Under Age 14 with Investment Income
- Form 3801—Passive Activity Loss Limitations
- Form 3801-CR—Passive Activity Credit Limitations
- Form 3803—Parents' Election to Report Child's Interest and Dividends
- Form 3805E—Installment Sale Income
- Form 3805P—Additional Taxes on Qualified Plans (Including IRAs) and Other Tax-Favored Accounts
- Form 3805V—Net Operating Loss (NOL) Computation and NOL and Disaster Loss Limitations—Individuals, Estates, and Trusts
- Form 3805Z—Enterprise Zone Deduction and Credit Summary
- Form 3806*—Los Angeles Revitalization Zone Deduction and Credit Summary

continued >

*Denotes non-calculating form

**Denotes 1120 Consolidated form

ULTRATAX CS – CALIFORNIA, CONT.

Form 3807*—Local Agency Military Base Recovery Area Deduction and Credit Summary
Form 3808*—Manufacturing Enhancement Area Credit Summary
Form 3809*—Targeted Tax Area Deduction and Credit Summary
Form 3885A—Amortization Adjustments, Capital Gain or Loss Adjustment
Form 4803e—Head of Household schedule
Form 5805—Underpayment of Estimated Tax by Individuals and Fiduciaries
Form 5805F—Underpayment of Estimated Tax by Farmers and Fishermen
Form 5870A*—Tax on Accumulation Distribution of Trusts
Form 8453—California e-file Return Authorization for Individuals
Form 8453—LLC-California E-File Return Authorization for Limited Liability Companies
Form 8454—e-file Opt-Out Record for Individuals
Form 8455—California e-file Payment Record for Individuals
Form 8879—California e-file Signature Authorization for Individuals
Schedule CA (540)—California Adjustments—Residents
Schedule CA (540NR)—California Adjustments—Nonresidents or Part-Year Residents
Schedule D—Capital Gain or Loss Adjustment
Schedule D (568)—Capital Gain or Loss
Schedule D-1—Sales of Business Property
Schedule G-1—Tax on Lump-Sum Distributions
Schedule P (540)—Alternative Minimum Tax and Credit Limitations—Residents
Schedule P (540NR)—Alternative Minimum Tax and Credit Limitations—Nonresidents or Part-Year Residents
Schedule R*—Apportionment and Allocation of Income
Schedule S—Other State Tax Credit
Schedule W-2 CG—Wage and Withholding Summary
California RDP Adjustments Worksheet—
Recalculated Federal Adjusted Gross Income
California SSMC Adjustments Worksheet

CALIFORNIA CORPORATE

With UltraTax/1120 California, you can process both C and S Corporation returns. The UltraTax corporate program allocates indirect liabilities and indirect deductions attributable to investment, subsidiary, and business capital.

California Forms and Schedules

Form BOE-100B*—Statement of Change in Control and Ownership of Legal Entities

Form 100—California Corporation Franchise or Income Tax Return
Form 100-ES—Corporation Estimated Tax
Form 100S—California S Corporation Franchise or Income Tax Return
Form 100W—California Corporation Franchise or Income Tax Return—Water's-Edge Filers
Form 100-WE—Water's-Edge Election
Form 100X—Amended Corporation Franchise or Income Tax Return
Form 199—California Exempt Organization Annual Information Return (for Homeowners Associations)
Form 540-ES—Estimated Tax for Individuals (for Composite Filing)
Form 540NR—California Nonresident or Part-Year Resident Income Tax Return (for Composite Filing)
Form 592*—Quarterly Resident and Nonresident Withholding Statement
Form 592-B*—Resident and Nonresident Withholding Tax Statement
Form 1115*—Request for Consent for a Water's-Edge Re-Election
Form 1117*—Request to Terminate Water's-Edge Election
Form 2416—Schedule of Included Controlled Foreign Corporations (CFC)
Form 2424—Water's-Edge Foreign Investment Interest Offset
Form 3501*—Employer Child Care Program/Contribution Credit
Form 3516*—Request for Copy of Tax Return
Form 3519—Payment Voucher for Automatic Extension for Individuals (for Composite Filing)
Form 3520—Power of Attorney
Form 3521*—Low-Income Housing Credit
Form 3523—Research Credit
Form 3533*—Change of Address
Form 3539—Payment Voucher for Automatic Extension for Corps and Exempt Orgs
Form 3540*—Credit Carryover Summary
Form 3544—Election to Assign Credit Within Combined Reporting Group
Form 3544—Election to Assign Credit Within Compined Reporting Group
Form 3546*—Enhanced Oil Recovery Credit
Form 3548*—Disabled Access Credit for Eligible Small Businesses
Form 3565*—Small Business Stock Questionnaire
Form 3577*—Pending Audit Tax Deposit Voucher for Corporations

continued >

*Denotes non-calculating form

**Denotes 1120 Consolidated form

ULTRATAX CS – CALIFORNIA CORPORATE, CONT.

Form 3581* Tax Deposit Refund and Transfer Request
Form 3586—Voucher for Corporation e-filed Returns
Form 3725*—Assets Transferred from Parent Corporation to Insurance Company Subsidiary
Form 3726—Deferred Intercompany Stock Account (DISA) and Capital Gains Information
Form 3801—Passive Activity Loss Limitations
Form 3801-CR—Passive Activity Credit Limitations
Form 3802—Corporate Passive Activity Loss and Credit Limitations
Form 3805E—Installment Sale Income
Form 3805Q—Net Operating Loss (NOL) Computation and NOL and Disaster Loss Limitations—Corporations
Form 3805Z—Enterprise Zone Deduction and Credit Summary
Form 3806—Los Angeles Revitalization Zone Deduction and Credit Summary
Form 3807—Local Agency Military Base Recovery Area Deduction and Credit Summary
Form 3808*—Manufacturing Enhancement Area Credit Summary
Form 3809—Targeted Tax Area Deduction and Credit Summary
Form 3834—Interest Computation Under the Look-Back Method for Completed Long-Term Contracts
Form 3864—Group Nonresident Return Election (for Composite Filing)
Form 3885—Corporation Depreciation and Amortization
Form 5805—Underpayment of Estimated Tax by Individuals and Fiduciaries (for Composite Filing)
Form 5806—Underpayment of Estimated Tax by Corporations
Form 8453-C—California e-file Return Authorization for Corporations
Schedule 1067A—Nonresident Group Return Schedule (for Composite Filing)
Schedule 1067B*—Group Nonresident Return Payment Transfer Request (for Composite Filing)
Schedule B/C (100S)—S Corporation Depreciation and Amortization, and Tax Credits
Schedule D (100S)—S Corporation Capital Gains and Losses and Built-In Gains
Schedule D-1—Sales of Business Property
Schedule H (100)—Dividend Income Deduction
Schedule H (100S)—S Corporation Dividend Income Deduction
Schedule H (100W)—Dividend Income Deduction—Water’s-Edge Filers
Schedule K-1 (100S)—Shareholder’s Share of Income,

Deductions, Credits, etc.
Schedule P (100)—Alternative Minimum Tax and Credit Limitations—Corporations
Schedule P (100W)—Alternative Minimum Tax and Credit Limitations—Water’s-Edge Filers
Schedule QS—Qualified
Subchapter S Subsidiary (QSub) Information Worksheet
Schedule R—Apportionment and Allocation of Income Combined Worksheets—(1120 Consolidated)

CALIFORNIA PARTNERSHIP / LIMITED LIABILITY COMPANY

The UltraTax/1065 California program provides for special allocations to partners or members where applicable. It also calculates apportionment ratios for clients doing business in multiple states. It processes returns for both partnerships and limited liability companies (LLC) and automatically computes partner/member amounts or allows you to force Schedule K-1 amounts.

California Forms and Schedules

Form BOE*-100-B—Statement of Change in Control and Ownership of Legal Entities
Form 565—Partnership Return of Income
Form 568—Limited Liability Company Return of Income
Form 540-ES—Estimated Tax for Individuals (for composite filing)
Form 540NR—Nonresident or Part-Year Resident Income Tax Return (for composite filing)
Form 592*—Quarterly Nonresident Withholding Statement
Form 592A*—Foreign Partner or Member Quarterly Withholding Statement
Form 592B—Resident and Nonresident Withholding Tax Statement
Form 3501*—Employer Child Care Credit
Form 3519—Payment for Automatic Extension for Individuals (for composite filing)
Form 3520—Power of Attorney
Form 3521*—Low-Income Housing Credit
Form 3522—LLC Tax Voucher
Form 3523*—Research Credit
Form 3533*—Change of Address
Form 3537—Payment for Automatic Extension for LLC’s
Form 3538—Payment for Automatic Extension
Form 3538—Payment for automatic extension for LPs, LLPs, and REMICs
Form 3546*—Enhanced Oil Recovery Credit

continued >

*Denotes non-calculating form

**Denotes 1120 Consolidated form

ULTRATAX CS – CALIFORNIA, CONT.

Form 3578*—Tax Deposit Voucher for LLCs
Form 3579*—Tax Deposit Voucher for LPs, LLPs, and REMICs
Form 3581*—Tax Deposit Refund and Transfer Request
Form 3587—Voucher for LP, LLP, and REMIC e-filed Returns
Form 3588—Voucher for LLC e-filed Returns
Form 3805E—Installment Sale Income
Form 3805Z*—Enterprise Zone Deduction and Credit Summary
Form 3807* LAMBRA Credit
Form 3809*—Targeted Tax Area Deduction and Credit Summary
Form 3832—Limited Liability Company Nonresident Member’s Consent
Form 3834*—Interest Computation Under the Look-Back Method for Completed Long-Term Contracts
Form 3864—Group Nonresident Return Election
Form 3885L—Depreciation and Amortization
Form 3885P—Depreciation and Amortization
Form 5805—Underpayment of Estimated Tax by Individuals and Fiduciaries (for composite filing)
Form 8453-LLC—California e-file Return Authorization for Limited Liability Companies
Form 8453-P—California e-file Return Authorization for Partnerships
Schedule D (565)—Capital Gain or Loss
Schedule D (568)—Capital Gain or Loss
Schedule D-1—Sales of Business Property
Schedule 1067A—Nonresident Group Return Schedule
Schedule 1067B*—Group Nonresident Return Payment Transfer Request
Schedule K-1 (565)—Partner’s Share of Income, Deductions, Credits, etc.
Schedule K-1 (568)—Member’s Share of Income, Deductions, Credits, etc.
Schedule R—Apportionment and Allocation of Income
Passthrough Sales Worksheet

CALIFORNIA PROPERTY TAX

The UltraTax California Property Tax program supports 990, 1040, 1041, 1065, 1120, and 1120S entities. It prepares property tax statements from depreciation data entered in the Asset tab.

Note: These statements can be used as an attachment to original county property statements sent by the assessor.

California Forms and Schedules

Form 571-A—Agricultural Property Statement
Form 571-D – Supplemental Schedule for Reporting Monthly Acquisitions and Disposals of Property Reported on Schedule B

of the Business Property Statement
Form 571-F – Agricultural Property Statement
Form 571-L—Business Property Statement
Form 571-LA*—Alternate Schedule A for Bank, Insurance Company, or financial Corporation Fixtures
Form 3520—Power of Attorney
Schedule A (571-A & 571-F)—Supplies
Schedule A (571-L) –Cost Detail: Equipment
Schedule B (571-A & 571-F)– Animals
Schedule B (571-L) – Cost Detail: Buildings, Building Improvements, and/ or Leasehold Improvements, Land Improvements, Land and Land Development
Schedule C (571-A) – Cost Detail: Equipment
Schedule C (571-F) – Fixed Machinery and Equipment
Schedule D (571-A)– Moveable Farm Equipment and Harvesters
Schedule D (571-F)– Moveable Farm Equipment

CALIFORNIA FIDUCIARY

California Forms and Schedules

Form 541—California Fiduciary Income Tax Return
Form 541-A—Trust Accumulation of Charitable Amounts
Form 541-B—Charitable Remainder and Pooled Income Trusts
Form 541-ES—Estimated Tax for Fiduciaries
Form 541-T—California Allocation of Estimated Tax Payments for Beneficiaries
Form 588*—Nonresident Withholding Waiver Requests
Form 592*—Quarterly Resident and Nonresident Withholding Statement
Form 592-B—Resident and Nonresident Withholding Tax Statement
Form 3510—Credit for Prior Year Alternative Minimum Tax—Individuals or Fiduciaries
Form 3516* (page 1 only)—Request for Copy of Personal Income Tax or Fiduciary Return
FTB 3520—Power of Attorney
Form 3526—Investment Interest Expense Deduction
Form 3533*—Change of Address
Form 3540*—Credit Carryover Summary
Form 3563—Payment Voucher for Automatic Extension for Fiduciaries
Form 3801—Passive Activity Loss Limitations
Form 3801-CR—Passive Activity Credit Limitations
Form 3805E—Installment Sale Income

continued >

*Denotes non-calculating form

**Denotes 1120 Consolidated form

ULTRATAX CS – CALIFORNIA, CONT.

Form 3805V—Net Operating Loss (NOL) Computation and NOL and Disaster Loss Limitations—Individuals, Estates, and Trusts

Form 3805Z*—Enterprise Zone Deduction and Credit Summary

Form 3806*—Los Angeles Revitalization Zone Deduction and Credit Summary

Form 3808*—Manufacturing Enhancement Area Credit Summary

Form 3809*—Targeted Tax Area Deduction and Credit Summary

Form 3885F—Depreciation and Amortization

Form 5805—Underpayment of Estimated Tax by Individuals and Fiduciaries

Form 5805F—Underpayment of Estimated Tax by Farmers and Fishermen

Form 5870A*—Tax on Accumulation Distribution of Trusts

Schedule D—Capital Gain or Loss

Schedule D-1—Sales of Business Property

Schedule G-1—Tax on Lump-Sum Distributions

Schedule J—Trust Allocation of an Accumulation Distribution

Schedule K-1—Beneficiary's Share of Income, Deductions, Credits, etc.

Schedule K-1 Instructions*—Beneficiary's Instructions for Schedule K-1

Schedule P—Alternative Minimum Tax and Credit Limitations—Fiduciaries

Schedule S—Other State Tax Credit

Grantor/Agency Report—Grantor's Share of Income, Deductions, Credits, etc.

CALIFORNIA ESTATE

The UltraTax/706 California program processes estate returns for resident and nonresident U.S. decedents having assets both within and outside California.

California Forms

Form ET-1A—California Additional Estate Tax Return

Form IT-2—Declaration Concerning Residence

FTB 3520—Power of Attorney

CALIFORNIA EXEMPT

With UltraTax/990 California you can process both exempt organization and private foundation returns.

California Forms and Schedules

Form 100-ES—Corporation Estimated Tax

Form 109—California Exempt Organization Business Income Tax Return

Form 199—California Exempt Organization Annual Information Return

Form 3516*—Request for Copy of Personal Income Tax or Fiduciary Return

Form 3533*—Change of Address

Form 3539 (CORP)—Automatic Extension for Corporations and Exempt Organizations

Form 3540*—Credit Carryover Summary

Form 3805Z*—Enterprise Zone Deduction and Credit Summary

Form 3806*—Los Angeles Revitalization Zone Deduction and Credit Summary

Form 3834*—Interest Computation Under the Look-back Method for Completed Long-term Contracts

Form 3885—Corporation Depreciation and Amortization

Form 3885F—Depreciation and Amortization

Form 5806—Underpayment of Estimated Tax by Corporations

Form RRF-1*—Registration Renewal Fee Report to Attorney General of California

Schedule D (541)—Capital Gain or Loss

Schedule D-1—Sales of Business Property

FTB 3509*—Political or Legislative Activities By Section 237 01d Organizations

FTB 3520—Power of Attorney

SUPPORT

You receive the same toll-free access to the Thomson Reuters Support HelpLine for state and local UltraTax CS products as you do for your federal UltraTax CS products.

MONEY-BACK GUARANTEE

All Thomson Reuters software is backed with a written money-back guarantee. If you are not completely satisfied with any fully licensed UltraTax CS product, return the software within the specified period for a refund.

PER-RETURN PRICING (PRP)

For your convenience, all UltraTax CS software is available on a per-return basis. UltraTax PRP offers a cost-effective way to handle states and entities that require a limited number of returns.

MORE INFORMATION

UltraTax CS products for Arkansas are just part of the family of more than 150 UltraTax CS state and local programs. For more information, please call a Thomson Reuters Account Representative at **800.968.8900**.

*Denotes non-calculating form

