

FTB Publication 1006

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2021 California Tax Forms and Related Federal Forms

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FRANCHISE TAX BOARD (FTB) FORMS	CALIFORNIA FORM – Title or Description	RELATED FEDERAL FORM	MAY USE FEDERAL FORM See Notes
100	California Corporation Franchise or Income Tax Return	1120, 1120-F 1120-FSC, 1120-H 1120-POL, 1120-RIC 1120-REIT	No No No
Sch H (100)	Dividend Income Deduction	Sch D (1120) None	No Not applicable
Sch P (100)	Alternative Minimum Tax and Credit Limitations — Corporations	None	Not applicable
Sch R	Apportionment and Allocation of Income	None	Not applicable
Sch R-7	Election to File a Unitary Taxpayers' Group Return	851	No
100-ES	Corporation Estimated Tax	1120-W	No
FTB 3577	Pending Audit Tax Deposit Voucher for Corporations	None	Not applicable
FTB 3586	Payment Voucher for Corporations and Exempt Organizations e-filed Returns	None	Not applicable
FTB 3885	Corporation Depreciation and Amortization	4562	No
100S	California S Corporation Franchise or Income Tax Return	1120-S	No
Sch B (100S)	S Corporation Depreciation and Amortization	4562	No
Sch C (100S)	S Corporation Tax Credits	None	Not applicable
Sch D (100S)	S Corporation Capital Gains and Losses and Built-In Gains	Sch D (1120-S)	No
Sch H (100S)	S Corporation Dividend Income Deduction	None	Not applicable
Sch K-1 (100S) Sch QS (100S)	Shareholder's Share of Income, Deductions, Credits, etc. Qualified Subchapter S Subsidiary (QSub) Information	Sch K-1 (1120-S) None	No Not applicable
100W	California Corporation Franchise or Income Tax Return — Water's-Edge Filers	None	Not applicable
Sch H (100W)	Dividend Income Deduction — Water's-Edge Filers	None	Not applicable
Sch P (100W)	Alternative Minimum Tax and Credit Limitations — Water's-Edge Filers	None	Not applicable
100-WE	Water's-Edge Election	None	Not applicable
FTB 1115	Request for Consent for a Water's-Edge Re-Election	None	Not applicable
FTB 1117	Request to Terminate Water's-Edge Election	None	Not applicable
FTB 2416	Schedule of Included Controlled Foreign Corporations (CFC)	None	Not applicable
FTB 2424	Water's-Edge Foreign Investment Interest Offset	None	Not applicable
100X	Amended Corporation Franchise or Income Tax Return	1120X	No
109	California Exempt Organization Business Income Tax Return	990-T	No
199	California Exempt Organization Annual Information Return	990, 990-EZ, 990-PF	No
540	California Resident Income Tax Return	Sch A (990) 1040	No No
540-ES	Estimated Tax for Individuals	1040-ES	No
FTB 3885A	Depreciation and Amortization Adjustments	4562	No
Sch CA (540)	California Adjustments — Residents	None	Not applicable
Sch D (540)	California Capital Gain or Loss Adjustment	Sch D (1040)	No
Sch D-1	Sales of Business Property	4797	No
Sch G-1	Tax on Lump-Sum Distributions	4972	No
Sch P (540)	Alternative Minimum Tax and Credit Limitations — Residents	6251	No
Sch S	Other State Tax Credit	None	Not applicable
Sch W-2	Wage and Tax Statement	None	Not applicable
540 2EZ	California Resident Income Tax Return	None	Not applicable
540NR	California Nonresident or Part-Year Resident Income Tax Return	1040 1040NR , 1040NR-EZ	No No
Sch 1067A	Nonresident Group Return Schedule	None	Not applicable
Sch 1067B	Group Nonresident Return Payment Transfer Request	None	Not applicable
FTB 3864	Group Nonresident Return Election	None	Not applicable
FTB 3576	Pending Audit Tax Deposit Voucher for Individuals	None	Not applicable
Sch CA (540NR)	California Adjustments - Nonresidents or Part-Year Residents	None	Not applicable
Sch D (540NR)	California Capital Gain or Loss Adjustment	Sch D (1040)	No
Sch P (540NR)	Alternative Minimum Tax and Credit Limitations — Nonresidents or Part-Year Residents	6251	No
Sch X	California Explanation of Amended Return Changes	1040X	No
541	California Fiduciary Income Tax Return	1041	No
Sch D (541)	Capital Gain or Loss	Sch D (1041)	No
Sch J (541)	Trust Allocation of an Accumulation Distribution	Sch J (1041)	No
Sch K-1 (541)	Beneficiary's Share of Income, Deductions, Credits, etc.	Sch K-1 (1041)	No
Sch P (541)	Alternative Minimum Tax and Credit Limitations – Fiduciaries Trust Accumulation of Charitable Amounts	Sch I (1041)	No No
541-A 541-B	Charitable Remainder and Pooled Income Trusts	1041-A 5227	NO NO
541-ES	Estimated Tax for Fiduciaries	1041-ES	No
541-QFT	California Income Tax Return for Qualified Funeral Trusts	1041-QFT	No
541-T	California Allocation of Estimated Tax Payments to Beneficiaries	1041-T	No
FTB 3885F (541)	Depreciation and Amortization	4562	No

FTB FORMS	CALIFORNIA FORM – Title or Description	RELATED FEDERAL FORM	MAY USE FEDERAL FORM See Notes
565	Partnership Return of Income	1065	No
Sch D (565)	Capital Gain or Loss	Sch D (1065)	No
Sch EO (565)	Pass-Through Entity Ownership	None	No
Sch K-1 (565)	Partner's Share of Income, Deductions, Credits, etc.	Sch K-1 (1065)	No
FTB 3579	Pending Audit Tax Deposit Voucher for LPs, LLPs, and REMICs	None	Not applicable
FTB 3885P (565)	Depreciation and Amortization	4562	No
568	Limited Liability Company Return of Income	None	Not applicable
Sch D (568)	Capital Gain or Loss	Sch D (1065)	No
Sch EO (568)	Pass-Through Entity Ownership	None	Not applicable
Sch K-1 (568)	Member's Share of Income, Deductions, Credits, etc.	Sch K-1 (1065)	No
FTB 3578	Pending Audit Tax Deposit Voucher for Limited Liability Companies (LLCs)	None	Not applicable
FTB 3832	Limited Liability Company Nonresident Members' Consent	None	Not applicable
FTB 3885L (568)	Depreciation and Amortization	4562	No
570	Nonadmitted Insurance Tax Return	None	Not applicable
587	Nonresident Withholding Allocation Worksheet	None	Not applicable
588	Nonresident Withholding Waiver Request	None	Not applicable
589	Nonresident Reduced Withholding Request	8804-C	No
590	Withholding Exemption Certificate	None	Not applicable
590-P	Nonresident Withholding Exemption Certificate for Previously Reported Income	None	Not applicable
592	Resident and Nonresident Withholding Statement	1042, 8804	No
592-A	Payment Voucher for Foreign Partner or Member Withholding	8813	No
592-B	Resident and Nonresident Withholding Tax Statement	1042-S, 8805	No
592-F	Foreign Partner or Member Annual Return	1042, 8804	No
592-PTE	Pass -Through Entity Annual Withholding Return	1042, 8804	No
592-Q	Payment Voucher for Pass - Through Entity Withholding	None	Not applicable
592-V	Payment Voucher for Resident and Nonresident Withholding	None	Not applicable
593	Real Estate Withholding Statement	8288, 8288-A	No
593-V	Payment Voucher for Real Estate Withholding	None	Not applicable
FTB 3461	California Limitation on Business Losses	461	Yes
FTB 3500	Exemption Application	1023, 1023-EZ, 1024	No No
FTB 3500A FTB 3502	Submission of Exemption Request Nonprofit Corporation Request for Pre-Dissolution Tax Abatement	1023, 1023-EZ, 1024 None	Not applicable
FTB 3503	Natural Heritage Preservation Credit	None	
FTB 3504	Enrolled Tribal Member Certification	None	Not applicable Not applicable
FTB 3506	Child and Dependent Care Expenses Credit	2441	Not applicable
FTB 3507	Prison Inmate Labor Credit	None	Not applicable
FTB 3509	Political or Legislative Activities by Section 23701d Organizations	None	Not applicable
FTB 3510	Credit for Prior Year Alternative Minimum Tax — Individuals or Fiduciaries	8801	No
FTB 3514	California Earned Income Tax Credit	Sch EIC (1040)	No
FTB 3516 (Page 1)	Request for Copy of Personal Income Tax or Fiduciary Tax Return	4506	No
FTB 3516 (Page 2)	Request for Corporation, Exempt Organization, Partnership, or Limited Liability Company Tax Return	4506	No
FTB 3519	Payment for Automatic Extension for Individuals	None	Not applicable
FTB 3520 BE	Business Entity or Group Nonresident Power of Attorney Declaration	2848	No
FTB 3520 PIT	Individual or Fiduciary Power of Attorney Declaration	2848	No
FTB 3520 RVK	Power of Attorney Declaration Revocation	2848	No
FTB 3521	Low-Income Housing Credit	8586	No
FTB 3522	LLC Tax Voucher	None	Not applicable
FTB 3523	Research Credit	6765	No
FTB 3525	Substitute for Form W-2, Wage and Tax Statement, or Form 1099-R, Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.	4852	Yes
FTB 3526	Investment Interest Expense Deduction	4952	No
FTB 3531	California Competes Tax Credit	None	Not applicable
FTB 3532	Head of Household Filing Status Schedule	None	Not applicable
FTB 3533	Change of Address for Individuals	8822	Yes
FTB 3533-B	Change of Address for Businesses, Exempt Organizations, Estates and Trusts	8822-B	Yes
FTB 3534	Tax Information Authorization	8821	No
FTB 3535	Tax Information Authorization Revocation	8821	No
FTB 3536	Estimated Fee for LLCs	None	Not applicable
FTB 3537	Payment for Automatic Extension for LLCs	None	Not applicable
FTB 3538	Payment for Automatic Extension for LPs, LLPs, and REMICs	None	Not applicable
FTB 3539	Payment for Automatic Extension for Corporations and Exempt Organizations	None	Not applicable
FTB 3540	Credit Carryover and Recapture Summary	None	Not applicable
FTB 3541	California Motion Picture and Television Production Credit	None	Not applicable
FTB 3544	Assignment of Credit	None	Not applicable
	Enhanced Oil Recovery Credit	8830	No
FID 3340		1	
FTB 3546 FTB 3547	Donated Agricultural Products Transportation Credit	None	Not applicable

FTB FORMS	CALIFORNIA FORM – Title or Description	RELATED FEDERAL FORM	MAY USE FEDERAL FORM See Notes
FTB 3551	Sale of Credit Attributable to an Independent Film	None	Not applicable
FTB 3554	New Employment Credit	None	Not applicable
FTB 3561C PC	Financial Statement	433-F	No
FTB 3563	Payment for Automatic Extension for Fiduciaries	None	Not applicable
FTB 3567	Installment Agreement Request	433-D	No
FTB 3568	Alternative Identifying Information for the Dependent Exemption Credit	None	Not applicable
FTB 3574	Special Election for Business Trusts and Certain Foreign Single Member LLCs	None	Not applicable
FTB 3580	Application and Election to Amortize Certified Pollution Control Facility	None	Not applicable
FTB 3581	Tax Deposit Refund and Transfer Request	None	Not applicable
FTB 3582	Payment Voucher for Individual e-filed Returns	None	Not applicable
FTB 3582-X	Payment Voucher for Individual e-filed Amended Returns	None	Not applicable
FTB 3586	Payment Voucher for Corporations and Exempt Organizations e-filed Returns	None	Not applicable
FTB 3587	Payment Voucher for LP, LLP, and REMIC e-filed Returns	None	Not applicable
FTB 3588	Payment Voucher for LLC e-filed Returns	None	Not applicable
FTB 3592	College Access Tax Credit	None	Not applicable
FTB 3596	Paid Preparer's Due Diligence Checklist for California Earned Income Tax Credit	8867	No
FTB 3725	Assets Transferred from Corporation to Insurance Company	None	Not applicable
FTB 3726	Deferred Intercompany Stock Account (DISA) and Capital Gains Information	None	Not applicable
FTB 3800	Tax Computation for Certain Children with Unearned Income	8615	No
FTB 3801	Passive Activity Loss Limitations	8582	No
FTB 3801-CR	Passive Activity Credit Limitations	8582-CR	No
FTB 3802	Corporate Passive Activity Loss and Credit Limitations	8810	No
FTB 3803	Parents' Election to Report Child's Interest and Dividends	8814	No
FTB 3804	Pass-Through Entity Elective Tax Calculation	None	Not applicable
FTB 3804-CR	Pass-Through Entity Elective Tax Credit	None	Not applicable
FTB 3805E	Installment Sale Income	6252	No
FTB 3805P	Additional Taxes on Qualified Plans (including IRAs) and Other	5329	No
FTB 3805Q	Tax-Favored Accounts Net Operating Loss (NOL) Computation and NOL and Disaster Loss		
FTB 3805V	Limitations — Corporations Net Operating Loss (NOL) Computation and NOL and Disaster Loss	None	Not applicable Not applicable
	Limitations — Individuals, Estates, and Trusts		
FTB 3805Z	Enterprise Zone Deduction and Credit Summary	None	Not applicable
FTB 3807	Local Agency Military Base Recovery Area Deduction and Credit Summary	None	Not applicable
FTB 3808	Manufacturing Enhancement Area Credit Summary	None	Not applicable
FTB 3809	Targeted Tax Area Deduction and Credit Summary	None	Not applicable
FTB 3814	New Donated Fresh Fruits or Vegetables Credit	None	Not applicable
FTB 3834	Interest Computation Under the Look-Back Method for Completed Long-Term Contracts	8697	No
FTB 3840	California Like-Kind Exchanges	8824	Yes (3)
FTB 3843	Payment Voucher for Fiduciary e-filed Returns	None	Not applicable
FTB 3849	Premium Assistance Subsidy	8962	No
FTB 3853	Health Coverage Exemptions and Individual Shared Responsibility Penalty	8965	No
FTB 3866	Main Street Small Business Tax Credit II	None	Not applicable
FTB 3893	Pass-Through Entity Elective Tax Payment Voucher	None	Not applicable
FTB 3895	California Health Insurance Marketplace Statement	1095-A	No
FTB 3913	Moving Expense Deduction	3903	No
FTB 4197	Information on Tax Expenditure Items	None	Not Applicable
FTB 5805	Underpayment of Estimated Tax by Individuals and Fiduciaries	2210	No
FTB 5805F	Underpayment of Estimated Tax by Farmers and Fishermen	2210-F	No
FTB 5806	Underpayment of Estimated Tax by Corporations	2220	No
FTB 5870A	Tax on Accumulation Distribution of Trusts	4970	No
FTB 8453	California e-file Return Authorization for Individuals	8453	No
FTB 8453-BE (PMT)	California Payment Authorization for Business Entities	None	Not applicable
FTB 8453-C	California e-file Return Authorization for Corporations	8453-C	No
FTB 8453-EO	California e-file Return Authorization for Exempt Organizations	8453-EO	No
FTB 8453-FID	California e-file Return Authorization for Fiduciaries	8453-FE	No
FTB 8453-FID (PMT)	California Payment for Automatic Extension and Estimate Payment Authorization for Fiduciaries	None	Not applicable
FTB 8453-LLC	California e-file Return Authorization for Limited Liability Companies	None	Not applicable
FTB 8453-OL	California Online e-file Return Authorization for Individuals	None	Not applicable
FTB 8453-P	California e-file Return Authorization for Partnerships	8453-PE	No
FTB 8453 (PMT)	California Payment for Automatic Extension and Estimate Payment Authorization for Individuals	None	Not applicable
FTB 8454	e-file Opt-Out Record for Individuals	None	Not applicable
FTB 8455	California e-file Payment Record for Individuals	None	Not applicable
FTB 8455-FID	California e-file Payment Record for Fiduciaries	None	Not applicable
FTB 8879	California e-file Signature Authorization for Individuals	8879	No
FTB 8879-FID	California e-file Signature Authorization for Fiduciaries	8879-F	No
		None	Not applicable
FTB 8879 (PMT)	California Electronic Funds Withdrawal Payment Signature Authorization for	INDIE	NULADDICADIC

Employment Development Department (EDD) FORMS	CALIFORNIA FORM – Title or Description	RELATED FEDERAL FORM	MAY USE FEDERAL FORM See Notes
DE 1 (2)	Commercial Employer Account Registration and Update Form	SS-4	No
DE 4	Employee's Withholding Allowance Certificate	W-4	Yes
DE 4P	Withholding Certificate for Pension or Annuity Payments	W-4P	Yes
DE 4S	Request for State Income Tax Withholding From Sick Pay	W-4S	Yes
DE 9	Quarterly Contribution Return and Report of Wages	941	No
DE 9C	Quarterly Contribution Return and Report of Wages (Continuation)	941	No

FEDERAL		RELATED	MAY USE
FORM NUMBER	FEDERAL FORM – Title or Description	CALIFORNIA FORM	FEDERAL FORM
		(FTB FORM unless noted)	See Notes
SS-4	Application for Employer Identification Number	DE 1 (EDD Form) (2)	No
T (Timber)	Forest Activities Schedule	None	Yes
W-2	Wage and Tax Statement	None	Yes
W-2G	Certain Gambling Winnings	None	Yes
W-3	Transmittal of Wage and Tax Statements	None	No
W-4	Employee's Withholding Allowance Certificate	DE 4 (EDD Form)	Yes
W-4P	Withholding Certificate for Pension or Annuity Payments	DE 4P (EDD Form)	Yes
W-4S	Request for Federal Income Tax Withholding From Sick Pay	DE 4S (EDD Form)	Yes
W-9	Request for Taxpayer Identification Number and Certification	None	Yes
56	Notice Concerning Fiduciary Relationship	None	Yes
433-D	Installment Agreement	FTB 3567	No
433-F	Collection Information Statement	FTB 3561C PC	No
461	Limitation on Business Losses	FTB 3461	Yes
706	United States Estate (and Generation-Skipping Transfer) Tax Return	None	Not applicable
851	Affiliations Schedule	Sch R-7 (100)	No
907	Agreement to Extend the Time to Bring Suit	None	Yes
926	Return by a U.S. Transferor of Property to a Foreign Corporation	None	Yes
941	Employer's Quarterly Federal Tax Return	DE 9 (EDD Form)	No
966	Corporate Dissolution or Liquidation	None	Yes
970	Application to Use LIFO Inventory Method	None	Yes
982	Reduction of Tax Attributes Due to Discharge of Indebtedness	None	Yes
	(and Section 1082 Basis Adjustment)		
990	Return of Organization Exempt from Income Tax	199	No
990 or 990-EZ	Public Charity Status and Public Support	199	No
(Sch A)			
990-EZ	Short Form Return of Organization Exempt from Income Tax	199	No
990-PF	Return of Private Foundation or Section 4947(a)(1) Nonexempt Charitable Trust	199	No
	Treated as a Private Foundation		
990-T	Exempt Organization Business Income Tax Return	109	No
1023	Application for Recognition of Exemption Under Section 501(c)(3) of the	FTB 3500	No
	Internal Revenue Code	L FTB 3500A	No
1023-EZ	Streamlined Application for Recognition of Exemption Under Section 501(c)(3)	FTB 3500	No
	of the Internal Revenue Code	L FTB 3500A	No
1024	Application for Recognition of Exemption Under Section 501(a)	FTB 3500	No
1010	10 - Side Leaves To Datus	L FTB 3500A	No
1040	U.S. Individual Income Tax Return	540, 540NR	No
		(If SMLLC, get Form 568 Booklet.)	
Sch 1 (1040)	Additional Income and Adjustments to Income	540, 540NR	No
Sch 2 (1040)	Additional Taxes	540, 540NR	No
		540, 540NR	No
Sch 3 (1040)	Additional Credits and Payments		Yes
Sch A (1040)	Itemized Deductions	Sch CA (540, 540NR)	
Sch B (1040)	Interest and Ordinary Dividends	None	Yes
Sch C (1040)	Profit or Loss From Business (Sole Proprietorship)	None	Yes
Sch D (1040)	Capital Gains and Losses	Sch D (540) Sch D (540NR)	No
Sah F (1040)	Cumplemental Income and Lass	None	No Yes
Sch E (1040)	Supplemental Income and Loss	FTB 3514	No
Sch EIC (1040)	Earned Income Credit		
Sch F (1040)	Profit or Loss From Farming	None Not applicable	Yes
Sch R (1040)	Credit for the Elderly or the Disabled	Not applicable	Not applicable
1040-ES	Estimated Tax for Individuals	540-ES	No
1040NR	U.S. Nonresident Alien Income Tax Return	540, 540NR	No
1040NR-EZ	U.S. Income Tax Return for Certain Nonresident Aliens With No Dependents	540, 540NR	No
1040-SR	U.S. Tax Return for Seniors	540, 540NR	No
1040-V	Payment Voucher	None	No
1040X	Amended U.S. Individual Income Tax Return	Sch X	No

1941 U.S. Income Tax Pleture for Estates and Trusts 541 No Sch D (1041) Alternative Minimum Tax — Estates and Trusts Sch D (1641) No Sch J (1041) Alternative Minimum Tax — Estates and Trusts Sch J (1641) No Sch J (1041) Beneficiarys Share of Income, Deductions, Chrotits, etc. Sch K (1541) No Sch K (1641) Beneficiarys Share of Income, Deductions, Chrotits, etc. Sch K (1541) No 1041-A Lis. Information Faulton Titus Accumutation of Charattale Announts Sch K (1541) No 1042-S Annual Withholding Tax Pleum for U.S. Source Income of Foreign Persons Sch Z (157) No 1042-S Annual Withholding Tax Pleum for U.S. Source Income Subject UW Withholding Sch Z (1665) No 1042-S Capital Gains and Losses Sch K (1651) No Sch K (1655) No 1042-S Fareigin Person U.S. Source Income Subject UW Withholding Sch K (1656) No Sch K (1656) No 1042-S Fareigin Person Phonted Health Insurance Offer and Coverage No No Yes 1084-B Featuruno Heaturuno Heatu	FEDERAL FORM NUMBER	FEDERAL FORM – Title or Description	RELATED CALIFORNIA FORM (FTB FORM unless noted)	MAY USE FEDERAL FORM See Notes
Sch D (1014) Capital Caines and Losses Sch D (541) No Sch J (1014) Accumutation Distribution for Certain Complex Trusts Sch J (541) No Sch J (1014) Accumutation Distribution for Certain Complex Trusts Sch J (541) No Sch J (1014) Accumutation Distribution for Certain Complex Trusts Sch J (541) No 1034 A U.S. Information Februm Trust Accumutation of Charitable Amounts Sch J (541) No 1034 CFT Micromation Februm Trust Accumutation of Charitable Amounts Sch J (767) No 1034 CFT Allocation of Estimated Trust Accumutation of Charitable Amounts Sch J (767) No 1034 CFT Allocation of Estimated Trust Accumutation of Contractone of Foreign Persons Sch J (765) No 1035 U.S. Return of Trustness Informe Sch J (766) No Sch J (766) No 1035 G. Capital Calins and Losses Sch J (766) No Sch J (766) No 1036 G. Trustness Information Extended Trust Accumutation Contractone Sch J (766) No No 1036 G. Trustness Information Extended Trustness Sch J (766) No No Yes IIIIIIIIIIIIIII	10/1	U.S. Income Tax Peturn for Estates and Trusts	,	
Sch 1(1041) Alternative Minimum Tax — Estates and Trusts Sch P (641) No Sch 1(1041) Beneticlary's Share of Income, Cerutina, Cangles Trusts Sch 1 (641) No Sch K1 (1041) Beneticlary's Share of Income, Cerutina, Cangles Trusts Sch K1 (641) No Sch K1 (541) Beneticlary's Share of Income, Tax for Estates and Trusts Sch K1 (641) No 1041-52 Estimated Income Tax for Estates and Trusts Sch K1 (641) No 1041-53 Estimated Income Tax for Estates and Trusts Sch K1 (641) No 1041-54 Annual Withholding Tax Feiturn for U.S. Source Income Subject to Withholding 592-88 No 1042-5 Capital Gains and Lasses Sch D (1055) No No 1042-6 Transmital of Hauth Coverage Information Returns Sch K1 (655) No 1084-6 Transmital of Hauth Coverage Information Returns No No No 1085-6 Health Insurance Offer and Coverage No No No No 1085-6 Health Coverage No No No No No 1085-6 Health Coverage No <td>-</td> <td></td> <td>-</td> <td></td>	-		-	
Sch J (1041) Accumulation Distribution for Certain Complex Trusts Sch J (541) No 1041-A U.S. Information Return Trust Accumulation of Charitable Amounts Sch J (541) No 1041-F2 Estimated Tornom Tax for Estates and Trusts Sch J (541) No 1041-F2 U.S. Information Return Trust Accumulation of Charitable Amounts Sch J (541) No 1041-F1 U.S. Income Tax feature for Quence Information Science Information Returns No 1055 U.S. Return of Partnerschip Income Information Returns None Yes 1064-C Transmittal of Health Coverage Information Returns None Yes 1064-C Employee-Provide Health Insurance Ofer and Coverage Information None Yes None 1065-C Employee-Provide Health Insurance Ofer and Coverage None Yes 1064-C Employee-Provide Health Insurance Ofer and Coverage None Yes 1065-C Employee-Provide Health Insurance Ofer and Coverage None Yes 1066-C Employee-Provide Health Insurance Ofer and Coverage None Yes 1068-C				
Sch K-1 (1011) Beneficiary's Share of Income, Deductions, Crodits, etc. Sch K-1 (Sr11) No 1041-A U.S. Information Return Turk Accumulation of Charatable Amounts 541-A No 1041-DFT Allocation of Estimated Tax Payments to Beneficiaries 541-BF No 1041-DFT Allocation of Estimated Tax Payments to Beneficiaries 541-CFT No 1042-2 Foreign Presons U.S. Source Income of Foreign Persons 592: 592-F No 1042-3 Foreign Persons U.S. Source Income of Foreign Persons 592: 592-F No 1042-4 Transmital of Partnership Income 561 561 (565) No 1042-5 Transmital of Partnership Income 561 561 (565) No 1043-6 Transmital of Partnership Income Nine Yes Nine Yes 1044-6 Transmital of Health Overage No Nine Yes No 1045-6 Employse-Provided Health Insurance Offer and Coverage None Yes No 1045-6 Employse-Provided Health Insurance Offer and Coverage None Yes No 1045-6<				
1041-A U.S. Information Return Trust Accumulation of Charitable Amounts 541-A No 1041-ES Estimated Ion Return Trust Accumulation of Charitable Amounts 541-DFT No 1041-FT U.S. Income Tax Return for Qualified Funeral Trusts 541-DFT No 1042 Annual Withholding Tax Return for U.S. Source Income of Dereign Persons 562, 562-F No 1042-S Foreign Persons U.S. Source Income Subject to Withholding 565, 455 No 1042-S Foreign Persons U.S. Source Income Subject to Withholding 565, 455 No 1045-S Foreign Persons U.S. Source Incomes Colleget to Withholding 565, 456 No 1046-C Transmittal of Parlows Persotted Health Insurance Offer and Coverage Information None Yes 1056-A Health Insurance Offer and Coverage None Yes None Yes 1056-A Health Insurance Offer and Coverage None Yes None Yes </td <td>(/</td> <td>· ·</td> <td>()</td> <td></td>	(/	· ·	()	
1041-ES Estimated income Tax for Estates and Trusts 541-ES No 1041-OFT US, Income Tax Return for Qualified Funeral Trusts 541-OFT No 1042 Annual Withholding Tax Return for Qualications 552-B2 No 1042-S Foreign Person's U.S. Source Income of Foreign Persons 552-B2 No 1045-S Capital Gains and Losses Sch D (1065) Sch D (1065) No 1046-C Partner S based in Loncene Sch D (1065) No Sch D (1065) No 1084-C Transmital of Employee-Provided Health Insurance Offer and Coverage Information None Yes 1085-B Health Insurance Marketplace Statement CTB 3395 No None Yes 1085-C Employee-Provided Health Insurance Offer and Coverage None Yes	· · · ·	Beneficiary's Share of Income, Deductions, Credits, etc.		No
1041-DT U.S. Income Tax Return for Qualified Funeral Trusts 541-DT No 1042 Annual Withholding Tax Return for U.S. Source Income of Foreign Persons 592, 592-F No 1082-S Foreign Persons 592, 593-F No 1085-S U.S. Return of Partnership Income 595-S No 585-Stan (1065) U.S. Return of Partnership Income 595-S No 585-Stan (1065) Partner's Share of Income, Deductions, Credits, etc. Sch F. (1655) No 1084-B Transmittal of Leakit Coverage Information Returns None Yes 1085-A Health Coverage None Yes 1085-A Health Coverage None Yes 1086-A Annual Summary and Transmittal of U.S. Information Returns None Yes 1086-A Annual Summary and Transmittal of U.S. Information Returns None Yes 1087-A Acquisition of Abandomment of Secured Property None Yes None Yes 1088-B Proceeds From Booker and Batter Exchange Transactions None Yes None Yes Yes <	1041-A	U.S. Information Return Trust Accumulation of Charitable Amounts	541-A	No
10417 Allocation of Estimated Tax Payments to Beneficiaries 541-T No 1042 Annual Withholding Tax Return for U.S. Source Income of Portigin Persons 592, 592-F No 1045 U.S. Return of Patnership Income 565 No 58h D (1065) Capital Gains and Losses Sch D (565) No 58h S (1065) Patnership Income Sch K 1(1055) No 1084-A Transmital of Health Coverage Information Returns None Yes 1085-B Transmital of Health Coverage None Yes 1085-C Employer-Provided Health Insurance Offer and Coverage None Yes 1085-C Employer-Provided Health Insurance Offer and Coverage None Yes 1085-B Health Coverage None Yes 1086 Morage Interest Statement None Yes None Yes 1089-A Cancellation of Debt None Yes None Yes Yes 1089-B Proceeds From Broker and Barter Exchange Transactions None Yes Yes Yes Yes Yes	1041-ES	Estimated Income Tax for Estates and Trusts	541-ES	No
10417 Allocation of Estimated Tax Payments to Beneficiaries 541-T No 1042 Annual Withholding Tax Return for U.S. Source Income of Portigin Persons 592, 592-F No 1045 U.S. Return of Patnership Income 565 No 58h D (1065) Capital Gains and Losses Sch D (565) No 58h S (1065) Patnership Income Sch K 1(1055) No 1084-A Transmital of Health Coverage Information Returns None Yes 1085-B Transmital of Health Coverage None Yes 1085-C Employer-Provided Health Insurance Offer and Coverage None Yes 1085-C Employer-Provided Health Insurance Offer and Coverage None Yes 1085-B Health Coverage None Yes 1086 Morage Interest Statement None Yes None Yes 1089-A Cancellation of Debt None Yes None Yes Yes 1089-B Proceeds From Broker and Barter Exchange Transactions None Yes Yes Yes Yes Yes	1041-QFT	U.S. Income Tax Beturn for Qualified Funeral Trusts	541-QFT	No
Instrument Annual Withholding Tax Return for U.S. Source Income of Foreign Persons 592-8- 592-8 No 1085 U.S. Return of Partnership Income 565 No 565 Sch D (1065) Qapital Gains and Losses Sch D (1065) No 564 Partner's Share of Income, Deductions, Credits, etc. Sch K-1 (1055) No 1084-B Transmitul of Health Coverage Information Patturns None Yes 1084-A Health Insurance Marketplace Statement FTB 3085 No 1085-B Health Coverage None Yes 1086-B Health Coverage None Yes 1086-B Annual Summery and Transmitul of U.S. Information Returns None Yes 1089-B Mortgage Interest Statement None Yes None Yes 1089-C Cancellation of Dott 1099-DI None Yes None Yes None Yes Yes None Yes Yes None Yes Yes Yes None Yes Yes Yes Yes Yes				
Display Foreign Persons U.S. Source Income Subject to Withholding 592-8 No 01065 U.S. Return of Partnership Income 565 No 054h D (1066) Capital Gains and Losses Sch D (1665) No 01094-B Transmital of Health Coverage Information Returns None Yes 1094-C Transmital of Health Insurance Offer and Coverage Information None Yes 1095-A Health Insurance Marketplace Statement FTB 3095 None Yes 1095-B Employee-Provide Health Insurance Offer and Coverage None Yes None Yes 1095-A Arruus Summary and Transmital of U.S. Information Returns None Yes None Yes<		,	-	
1065 U.S. Feurier of Partnership Income 565 No Sch D (1065) Partner's Share of Income, Deductions, Credits, etc. Sch K 1 (565) No 1094-B Transmittal of Employer-Provided Health Insurance Offer and Coverage Information Nume Yes 1095-A Health Insurance Marketplace Statement FTB 3095 No 1095-B Health Coverage Nome Yes 1095-C Employer-Provided Health Insurance Offer and Coverage Nome Yes 1095-B Health Coverage Nome Yes 1095-C Employer-Provided Health Insurance Offer and Coverage Nome Yes 1098-B Mortage Interest Statement Nome Yes Nome 1099-C Cancellation of Debt Barler Exchange Transactions Nome Yes Nome <				-
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1094-C Transmittal of Employer-Provided Health Insurance Offer and Coverage Information Nume Yes 1095-A Health Insurance Marketplace Statement FTB 3695 No 1095-B Health Coverage None Yes 1095-C Employer-Provided Health Insurance Offer and Coverage None Yes 1096 Annual Summary and Transmittal of U.S. Information Returns None Yes 1098 Mortgage Interest Statement None Yes None Yes 1099-A Acquisition of Abardonment of Secured Property None Yes None	Sch K-1 (1065)	Partner's Share of Income, Deductions, Credits, etc.	Sch K-1 (565)	No
1094-C Transmittal of Employee-Provided Health Insurance Offer and Coverage Information Internet Returns Yes 1095-A Health Insurance Markstplace Statement FTB 3695 No 1095-B Health Coverage None Yes 1095-C Employee-Provided Health Insurance Offer and Coverage None Yes 1096 Mortgage Interest Statement Isomation Returns None Yes 1099-A Acquisition of Abardonment of Secured Property None Yes None Yes 1099-B Proceeds From Broker and Batre Exchange Transactions None Yes None Yes<	1094-B	Transmittal of Health Coverage Information Returns	None	Yes
1095-B Health Coverage None Yes 1095-C Employer-Provided Health Insurance Olfer and Coverage None Yes 1096 Annual Summary and Transmittal of U.S. Information Returns None Yes 1097-A Acquisition or Abandonment of Secured Property None Yes 1099-A Acquisition or Abandonment of Secured Property None Yes 1099-C Cancellation of Debt None Yes 1099-C Carcellation of Debt None Yes 1099-G Certain Government Payments None Yes 1099-HIC Long-Term Care and Accelerated Death Benefits None Yes 1099-HIC Long-Term Care and Accelerated Death Benefits None Yes 1099-HIC Nonemployee Compensation None Yes 1099-HIC Nonemployee Compensation None Yes 1099-G Original Issue Discounts None Yes 1099-HIC Nonemployee Compensation None Yes 1099-PAT Taxable Distributions From Anl-RA, Archer M-S, or Medicare Adv Intage MSA None Yes 1099-A Proceeds from Real Estate Transactions None Yes 1099-A Distributions From Anl-RA, or Medicare Adv Intage MSA None </td <td>1094-C</td> <td>Transmittal of Employer-Provided Health Insurance Offer and Coverage Information</td> <td>None</td> <td>Yes</td>	1094-C	Transmittal of Employer-Provided Health Insurance Offer and Coverage Information	None	Yes
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1099-S Proceeds from Real Estate Transactions None Yes (*) 1099-SA Distributions From an HSA, Archen ISA, or Medicare Advantage MSA None Yes (*) 1120 U.S. Corporation Income Tax Feturn 100 No Sch D (1120) Capital Gains and Losses 100 No 1120-F U.S. Income Tax Return of a Forsign Corporation 100 No 1120-FSC U.S. Income Tax Return of a Forsign Corporation 100 No 1120-H U.S. Income Tax Return of a Forsign Corporation Return 100 No 1120-FDL U.S. Income Tax Return for Regulated Investment Trusts 100 No 1120-RDL U.S. Income Tax Return for Regulated Investment Companies 100 No 1120-RDL U.S. Income Tax Return for an S Corporation 100 No 1120-RDL U.S. Income Tax Return for an S Corporation 100 No 1120-RDL U.S. Income Tax Return for an S Corporation 100 No 1120-RDL U.S. Income Tax Return for an S Corporation 100S No Sch K-1 (1120-S) S. Income Eax Return for an S Corporatio		Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs,		
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2220 Underpayment of Estimated Tax by Corporations FTB 5806 No				
	2350	Application for Extension of Time to File U.S. Income Tax Return	Not applicable	Not applicable

FEDERAL FORM NUMBER	FEDERAL FORM – Title or Description	RELATED CALIFORNIA FORM (FTB FORM unless noted)	MAY USE FEDERAL FORM See Notes
2441	Child and Dependent Care Expenses	FTB 3506	No
2678	Employer/Payer Appointment of Agent	None	Yes
	[]	FTB 3520 BE	No
2848	Power of Attorney and Declaration of Representative	FTB 3520 PIT	No
2040	Tower of Automey and Declaration of hepresentative	FTB 3520 RVK	No
0445	Analisetian for Ohenne in Assessmine Mathed		
3115	Application for Change in Accounting Method	None	Yes
3468	Investment Credit	Not applicable	Not applicable
3800	General Business Credit	None	No
3903	Moving Expenses	FTB 3913	No
4137	Social Security and Medicare Tax on Unreported Tip Income	Not applicable	Not applicable
4255	Recapture of Investment Credit	Not applicable	Not applicable
4419	Application for Filing Information Returns Electronically (FIRE)	None	Yes
4461	Application for Approval of Master or Prototype or Volume Submitter	None	Yes
	Defined Contribution Plans		
4466	Corporation Application for Quick Refund of Overpayment of Estimated Tax	Not applicable	Not applicable
4506	Request for Copy of Tax Return	FTB 3516	No
		FTB 3885	No
	Description and Association	FTB 3885A	No
4562	Depreciation and Amortization	FTB 3885F (541)	No
		FTB 3885L (568)	No
		FTB 3885P (565)	No
1660	Statement of Payments Received		Yes
4669		None	
4670	Request for Relief of Payment of Certain Withholding Taxes	None	Yes
4684	Casualties and Thefts	None	Yes
4797	Sales of Business Property	Sch D-1	No
4835	Farm Rental Income and Expenses	None	Yes
4852	Substitute for Form W-2, Wage and Tax Statement, or Form 1099-R, Distributions	FTB 3525	Yes
1002	From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, Etc.		103
4868	Application for Automatic Extension of Time to File U.S. Individual Income Tax Return	Not applicable	Not applicable
4952	Investment Interest Expense Deduction	FTB 3526	No
4970	Tax on Accumulation Distribution of Trusts	FTB 5870A	No
4972	Tax on Lump-Sum Distributions	Sch G-1	No
			-
5227	Split-Interest Trust Information Return	541-B	No
5329	Additional Taxes on Qualified Plans (including IRAs) and Other Tax-Favored Accounts	FTB 3805P	No
5405	Repayment of the First-Time Homebuyer Credit	None	Not applicable
5471	Information Return of U.S. Persons With Respect to Certain Foreign Corporations	None	Yes
5472	Information Return of a 25% Foreign-Owned U.S. Corporation or a Foreign	None	Yes
	Corporation Engaged in a U.S. Trade or Business		
5498	IRA Contribution Information	None	Yes (1)
5754	Statement by Person(s) Receiving Gambling Winnings	None	Yes
5884	Work Opportunity Credit	Not applicable	Not applicable
6198	At-Risk Limitations	None	Yes
	п	Sch P (540)	No
6251	Alternative Minimum Tax — Individuals	Sch P (540NR)	No
6252	Installment Sale Income	FTB 3805E	No
6765			
	Credit for Increasing Research Activities	FTB 3523	No
7004	Application for Automatic Extension of Time To File Certain Business Income Tax, Information, and Other Returns	Not applicable	Not applicable
8023	Elections Under Section 338 for Corporations Making Qualified Stock Purchases	None	Yes
8275	Disclosure Statement	None	Yes
8275-R	Regulation Disclosure Statement	None	Yes
8288	U.S. Withholding Tax Return for Dispositions by Foreign Persons of	593	No
8288-A	U.S. Real Property Interests Statement of Withholding on Dispositions by Foreign Persons of U.S. Real Property Interests	593	No
8288-B	Application for Withholding Certificate for Dispositions by Foreign Persons of U.S. Real Property Interests	593	No
8300	Report of Cash Payments Over \$10,000 Received in a Trade or Business	None	Yes
8453	U.S. Individual Income Tax Transmittal for an IRS e-file Return	FTB 8453	No
8453-C	U.S. Corporation Income Tax Declaration for an IRS e-file Return	FTB 8453-C	No
8453-EO	Exempt Organization Declaration and Signature for Electronic Filing	FTB 8453-EO	No
8453-FE	U.S. Estate or Trust Declaration for an IRS e-file Return	FTB 8453-FID	No
8453-PE	U.S. Partnership Declaration for an IRS e-file Return	FTB 8453-P	No
8453-S	U.S. S Corporation Income Tax Declaration for an IRS e-file Return	FTB 8453-C	No
8582	Passive Activity Loss Limitations	FTB 3801	No
8582-CR	Passive Activity Credit Limitations Low-Income Housing Credit	FTB 3801-CR FTB 3521	No No
8586			NIO.

FEDERAL FORM NUMBER	FEDERAL FORM – Title or Description	RELATED CALIFORNIA FORM (FTB FORM unless noted)	MAY USE FEDERAL FORM See Notes
8615	Tax for Certain Children Who Have Unearned Income	FTB 3800	No
8697	Interest Computation Under the Look-Back Method for Completed Long-Term Contracts	FTB 3834	No
8801	Credit for Prior Year Minimum Tax — Individuals, Estates and Trusts	FTB 3510	No
8804	Annual Return for Partnership Withholding Tax (Section 1446)	592, 592-A, 592-F	No
8804-C	Certificate of Partner-Level Items to Reduce Section 1446 Withholding	None	No
8805	Foreign Partner's Information Statement of Section 1446 Withholding Tax	592-B	No
8810	Corporate Passive Activity Loss and Credit Limitations	FTB 3802	No
8813	Partnership Withholding Tax Payment Voucher (Section 1446)	592-A	No
8814	Parent's Election To Report Child's Interest and Dividends	FTB 3803	No
8821	Tax Information Authorization {	FTB 3534 FTB 3535	No No
8822	Change of Address	FTB 3533	Yes
8822-B	Change of Address or Responsible Party - Business	FTB 3533-B	Yes
8824	Like-Kind Exchanges	FTB 3840	Yes (3)
8825	Rental Real Estate Income and Expenses of a Partnership or an S Corporation	None	Yes
8826	Disabled Access Credit	FTB 3548	No
8827	Credit for Prior Year Minimum Tax — Corporations	Sch P (100)	No
8829	Expenses for Business Use of Your Home	No	Yes
8832	Entity Classification Election	No	Yes
8838-P	Consent To Extend the Time To Assess Tax Pursuant to the Gain Deferral Method (Section 721(c))	None	No
8839	Qualified Adoption Expenses	None	Not applicable
8842	Election to Use Different Annualization Periods for Corporate Estimated Tax	None	Yes
8867	Paid Preparer's Due Diligence Checklist	FTB 3596	No
8869	Qualified Subchapter S Subsidiary Election	None	Yes
8872	Political Organization Report of Contributions and Expenditures	None	Not applicable
8879	IRS e-file Signature Authorization	FTB 8879	No
8879-F	IRS e-file Signature Authorization for Form 1041	FTB 8879-FID	No
8886	Reportable Transaction Disclosure Statement	None	Yes
8918	Material Advisor Disclosure Statement	None	Yes
8938	Statement of Specified Foreign Financial Assets	None	Yes
8940	Request for Miscellaneous Determination	None	Not applicable
8962	Premium Tax Credit (PTC)	FTB 3849	No
8965	Health Coverage Exemptions	FTB 3853	No
8971	Information Regarding Beneficiaries Acquiring Property From a Decedent	None	Not applicable
8975	Country-by-Country Report	None	Yes
Sch A (8975)	Tax Jurisdiction and Constituent Entity Information	None	Yes
9465	Installment Agreement Request	FTB 3567	No

Notes

No

California form must be used. If there is no difference between California and federal amounts, you may use a copy of the federal form. If there is a difference between California and federal amounts use the California form. If there is no California form, complete the federal form using California amounts and attach it to your California tax return. Yes

Not

Federal form is not applicable to California tax or California form is not applicable for federal tax. Copies of paper information returns (1099 series, 1098, and 5498) filed with the Internal Revenue Service are not required to be filed with the Franchise Tax Board (FTB). However, if California and federal amounts differ, information returns may be attached to federal Form 1096 and filed with applicable (1) the FTB.

Form number may vary based on industry-specific registration. FTB 3840 is required if California property is exchanged for like-kind property located out of state. If the taxpayer exchanges California property for California property, use federal Form 8824 with California amounts. (2) (3)