

# CALIFORNIA TAX FORMS AND RELATED FEDERAL FORMS

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, 1120F 1120-FSC, 1120-H 1120-POL, 1120-RIC 1120-REIT Sch D (1120)	No No No No No
Sch H (100)	Dividend Income Deduction	None	Not applicable
Sch P (100)	Alternative Minimum Tax and Credit Limitations — Corporations	4626	No
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	Not applicable
FTB 3539	Payment for Automatic Extension for Corps and Exempt Orgs	None	Not applicable
FTB 3565	Small Business Stock Questionnaire	None	Not applicable
FTB 3805Q	Net Operating Loss (NOL) Computation and NOL and Disaster Loss Limitations — Corporations	None	Not applicable
FTB 3577	Pending Audit Tax Deposit Voucher for Corporations	None	Not applicable
FTB 3586	Payment Voucher for Corporation Electronically Filed (e-filed) Returns	None	Not applicable
FTB 3885	Corporation Depreciation and Amortization	4562	No
100S	California S Corporation Franchise or Income Tax Return	1120S	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 (1120S)	No
Sch H (100S)	S Corporation Dividend Income Deduction	None	Not applicable
Sch K-1 (100S)	Shareholder's Share of Income, Deductions, Credits, etc.	Sch K-1 (1120S)	No
100 W	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, 990EZ, 990-PF Sch A (990)	No No
540	California Resident Income Tax Return	1040	No
540-ES	Estimated Tax for Individuals	1040-ES	No
FTB 3519	Payment for Automatic Extension for Individuals	None	Not applicable
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 Withholding Summary	None	Not applicable
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.	None	Not applicable
540A	California Resident Income Tax Return	1040A	No
540 2EZ	California Resident Income Tax Return	1040EZ	Not applicable
540NR	California Nonresident or Part-Year Resident Income Tax Return — (Long and Short Forms)	1040, 1040A, 1040NR, 1040NR-EZ	No No
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
540X	Amended Individual Income Tax Return	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

FTB FORMS	CALIFORNIA FORM – Title or Description	RELATED FEDERAL FORM	MAY USE FEDERAL FORM See Notes
Sch P (541) 541-A 541-B 541-ES 541-QFT 541-T FTB 3885F (541)	Alternative Minimum Tax and Credit Limitations – Fiduciaries Trust Accumulation of Charitable Amounts Charitable Remainder and Pooled Income Trusts Estimated Tax for Fiduciaries California Income Tax Return for Qualified Funeral Trusts California Allocation of Estimated Tax Payments to Beneficiaries Depreciation and Amortization	Sch I (1041) 1041-A 5227 1041-ES 1041-QFT 1041-T 4562	No No No No No No No
565 Sch D (565) Sch K-1 (565) FTB 3579 FTB 3885P (565)	Partnership Return of Income Capital Gain or Loss Partner's Share of Income, Deductions, Credits, etc. Pending Audit Tax Deposit Voucher for LPs, LLPs, and REMICs Depreciation and Amortization	1065 Sch D (1065) Sch K-1 (1065) None 4562	No No No Not applicable No
568 Sch D (568) Sch K-1 (568) FTB 3578 FTB 3832 FTB 3885L (568)	Limited Liability Company Return of Income Capital Gain or Loss Member's Share of Income, Deductions, Credits, etc. Pending Audit Tax Deposit Voucher for LLCs Limited Liability Company Nonresident Members' Consent Depreciation and Amortization	None Sch D (1065) Sch K-1 (1065) None None 4562	Not applicable No No Not applicable Not applicable No
570 587 588 589 590 590-P 592 592-A 592-B 592-F 592-V 593 593-C 593-E 593-I 593-V	Nonadmitted Insurance Tax Return Nonresident Withholding Allocation Worksheet Nonresident Withholding Waiver Request Nonresident Reduced Withholding Request Withholding Exemption Certificate Nonresident Withholding Exemption Certificate for Previously Reported Income Resident and Nonresident Withholding Statement Payment Voucher for Foreign Partner or Member Withholding Resident and Nonresident Withholding Tax Statement Foreign Partner or Member Annual Return Payment Voucher for Resident and Nonresident Withholding Real Estate Withholding Tax Statement Real Estate Withholding Certificate Real Estate Withholding — Computation of Estimated Gain or Loss Real Estate Withholding Installment Sale Acknowledgement Payment Voucher for Real Estate Withholding	None None None None None None 1042, 8804 8813 1042S, 8805 1042, 8804 None 8288, 8288-A None None None None	Not applicable Not applicable Not applicable Not applicable Not applicable Not applicable No No No No Not applicable No Not applicable Not applicable Not applicable Not applicable
FTB 3500 FTB 3500A FTB 3501 FTB 3503 FTB 3506 FTB 3507 FTB 3509 FTB 3510 FTB 3511 FTB 3516 (Side 1) FTB 3516 (Side 2)	Exemption Application Submission of Exemption Request Employer Child Care Program/Contribution Credit Natural Heritage Preservation Credit Child and Dependent Care Expenses Credit Prison Inmate Labor Credit Political or Legislative Activities by Section 23701d Organizations Credit for Prior Year Alternative Minimum Tax — Individuals or Fiduciaries Environmental Tax Credit Request for Copy of Personal Income Tax or Fiduciary Return Request for Copy of Corporation, Exempt Organization, Partnership, or Limited Liability Company Return	1023, 1024 None None None 2441 None None 8801 None 4506 4506	No Not applicable Not applicable Not applicable No Not applicable Not applicable No Not applicable No No
FTB 3519 FTB 3520 FTB 3521 FTB 3522 FTB 3523 FTB 3525	Payment for Automatic Extension for Individuals Power of Attorney Low-Income Housing Credit LLC Tax Voucher Research Credit 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.	None 2848, 8821 8586 None 6765 4852	Not applicable Yes No Not applicable No No
FTB 3526 FTB 3527 FTB 3528-A FTB 3533 FTB 3536 FTB 3537 FTB 3538	Investment Interest Expense Deduction New Jobs Credit Application for New Home Credit Change of Address Estimated Fee for LLCs Payment for Automatic Extension for LLCs Payment for Automatic Extension for LPs, LLPs, and REMICs	4952 None None 8822 None None None	No Not applicable Not applicable Yes Not applicable Not applicable Not applicable
FTB 3539 FTB 3540 FTB 3544 FTB 3544A FTB 3546	Payment for Automatic Extension for Corps and Exempt Orgs Credit Carryover Summary Election to Assign Credit Within Combined Reporting Group List of Assigned Credit Received and/or Claimed by Assignee Enhanced Oil Recovery Credit	None None None None 8830	Not applicable Not applicable Not applicable Not applicable No

FTB FORMS	CALIFORNIA FORM – Title or Description	RELATED FEDERAL FORM	MAY USE FEDERAL FORM See Notes
FTB 3547	Donated Agricultural Products Transportation Credit	None	Not applicable
FTB 3548	Disabled Access Credit for Eligible Small Businesses	8826	No
FTB 3549A	Application for New Home/First-Time Buyer Credit	None	Not applicable
FTB 3549RR	Reservation Request for New Home Credit	None	Not applicable
FTB 3551	Sale of Credit Attributable to an Independent Film	None	Not applicable
FTB 3553	Enterprise Zone Employee Credit	None	Not applicable
FTB 3561	Installment Agreement Financial Statement	433-D	No
FTB 3563	Payment for Automatic Extension for Fiduciaries	None	Not applicable
FTB 3567	Installment Agreement Request	9465	No
FTB 3570	Waiver Extending Statute of Limitations	None	Not applicable
FTB 3571	Request for Estate Income Tax Clearance Certificate	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 3586	Payment Voucher for Corporation 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 3601	Transmittal of Annual 1098, 1099, 5498, W-2G Information	4804	No
FTB 3604	Transmittal of Paperless Schedules K-1 (565 or 568) on CD or Diskette	None	Not applicable
FTB 3725	Assets Transferred from Parent Corporation to Insurance Company Subsidiary	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 Investment 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 3805D	Net Operating Loss (NOL) Carryover Computation and Limitation – Pierce's Disease	None	Not applicable
FTB 3805E	Installment Sale Income	6252	No
FTB 3805P	Additional Taxes on Qualified Plans (including IRAs) and Other Tax-Favored Accounts	None	Not applicable
FTB 3805Q	Net Operating Loss (NOL) Computation and NOL and Disaster Loss Limitations — Corporations	None	Not applicable
FTB 3805V	Net Operating Loss (NOL) Computation and NOL and Disaster Loss Limitations — Individuals, Estates, and Trusts	None	Not applicable
FTB 3805Z	Enterprise Zone Deduction and Credit Summary	None	Not applicable
FTB 3806	Los Angeles Revitalization 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 3834	Interest Computation Under the Look-Back Method for Completed Long-Term Contracts	8697	No
FTB 4092	Media Filing Application	4419	Yes
FTB 5805	Underpayment of Estimated Tax by Individuals and Fiduciaries	2210	No
FTB 5805F	Underpayment of Estimated Tax by Farmers and Fishermen	2210F	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-C	California e-file Return Authorization for Corporations	8453-C	No
FTB 8453-LLC	California e-file Return Authorization for Limited Liability Companies	None	No
FTB 8453-OL	California Online e-file Return Authorization for Individuals	8453-OL	No
FTB 8453-P	California e-file Return Authorization for Partnerships	8453-PE	No
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 8879	California e-file Signature Authorization for Individuals	8879	No
Employment Development Department (EDD) FORMS	CALIFORNIA FORM – Title or Description	RELATED FEDERAL FORM	MAY USE FEDERAL FORM See Notes
DE 1	Employer Registration 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 6	Quarterly Wage and Withholding Report	941	No
DE 7	Annual Reconciliation Statement	W-3	No
DE 166	Magnetic Media — Submittal Sheet Quarterly Wage and Withholding Information	4804	No

FEDERAL FORM NUMBER	FEDERAL FORM – Title or Description	RELATED CALIFORNIA FORM (FTB FORM unless noted)	MAY USE FEDERAL FORM See Notes
SS-4	Application for Employer Identification Number	DE 1 (EDD Form)	No**
T (Timber)	Forest Activity Schedule	None	Yes
W-2	Wage and Tax Statement	None	Yes
W-3	Transmittal of Wage and Tax Statements	DE 7 (EDD Form)	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
851	Affiliations Schedule	Sch R-7 (100)	No
872	Consent to Extend the Time to Assess Tax	FTB 3570	No
875	Acceptance of Examiner's Findings By a Partnership, Fiduciary, S Corporation or Interest Charge Domestic International Sales Corporation	None	Yes
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 6 (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 (and Section 1082 Basis Adjustment)	None	Yes
990	Return of Organization Exempt from Income Tax	199	No
990 (Sch A)	Public Charity Status and Public Support	199	No
990EZ	Short Form Return of Organization Exempt From Income Tax	199	No
990PF	Return of Private Foundation or Section 4947(a)(1) Nonexempt Charitable Trust Treated As a Private Foundation	199	No
990T	Exempt Organization Business Income Tax Return	109	No
1023	Application for Recognition of Exemption Under Section 501(c)(3) of the Internal Revenue Code	FTB 3500	No
1024	Application for Recognition of Exemption Under Section 501(a)	FTB 3500	No
1040	U.S. Individual Income Tax Return	540	No
Sch A (1040)	Itemized Deductions	None	Yes
Sch B (1040)	Interest and Ordinary Dividends	None	Yes
Sch C (1040)	Profit or Loss From Business	None	Yes
Sch C-EZ (1040)	Net Profit From Business	None	Yes
Sch D (1040)	Capital Gains and Losses	{ Sch D (540) Sch D (540NR)	No No
Sch E (1040)	Supplemental Income and Loss	None	Yes
Sch F (1040)	Profit or Loss From Farming	None	Yes
Sch R (1040)	Credit for the Elderly or the Disabled	Not applicable	Not applicable
1040A	U.S. Individual Income Tax Return	540A	No
1040-ES	Estimated Tax for Individuals	540-ES	No
1040EZ	Income Tax Return for Single and Joint Filers With No Dependents	540 2EZ	No
1040NR	U.S. Nonresident Alien Income Tax Return	540NR (Long)	No
1040NR-EZ	U.S. Income Tax Return for Certain Nonresident Aliens With No Dependents	540NR (Short)	No
1040-V	Payment Voucher	540-V	No
1040X	Amended U.S. Individual Income Tax Return	540X	No
1041	U.S. Income Tax Return for Estates and Trusts	541	No
Sch D (1041)	Capital Gains and Losses	Sch D (541)	No
Sch I (1041)	Alternative Minimum Tax — Fiduciaries	Sch P (541)	No
Sch J (1041)	Accumulation Distribution for Certain Complex Trusts	Sch J (541)	No
Sch K-1 (1041)	Beneficiary's Share of Income, Deductions, Credits, etc.	Sch K-1 (541)	No
1041-ES	Estimated Income Tax for Estates and Trusts	541-ES	No
1041-A	U.S. Information Return Trust Accumulation of Charitable Amounts	541-A	No
1041-T	Allocation of Estimated Tax Payments to Beneficiaries	541-T	No
1041-QFT	U.S. Income Tax Return for Qualified Funeral Trusts	541-QFT	No
1042	Annual Withholding Tax Return for U.S. Source Income of Foreign Persons	592-A, 592-F	No
1042S	Foreign Person's U.S. Source Income Subject to Withholding	592-B	No
1065	U.S. Return of Partnership Income	565	No
Sch D (1065)	Capital Gains and Losses	Sch D (565)	No
Sch K-1 (1065)	Partner's Share of Income, Credits, Deductions, etc.	Sch K-1 (565)	No
1096	Annual Summary and Transmittal of U.S. Information Returns	None	Yes
1098	Mortgage Interest Statement	None	Yes
1099-A	Acquisition or Abandonment of Secured Property	None	Yes

FEDERAL FORM NUMBER	FEDERAL FORM – Title or Description	RELATED CALIFORNIA FORM (FTB FORM unless noted)	MAY USE FEDERAL FORM See Notes
1099-B 1099-C 1099-DIV	Proceeds From Broker and Barter Exchange Transactions Cancellation of Debt Dividends and Distributions	None None None	Yes Yes Yes
1099-G 1099-INT 1099-LTC 1099-MISC 1099-SA 1099-OID 1099-PATR 1099-R	Certain Government Payments Interest Income Long-Term Care and Accelerated Death Benefits Miscellaneous Income Distributions From an HSA, Archer MSA, or Medicare Advantage MSA Original Issue Discount Taxable Distributions Received From Cooperatives Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.	None None None None None None None None	Yes Yes Yes Yes Yes Yes Yes Yes
1120 Sch D (1120) 1120F 1120-FSC 1120-H 1120-POL 1120-REIT 1120-RIC 1120S Sch D (1120S) Sch K-1 (1120S) 1120-W 1120X 1128	U.S. Corporation Income Tax Return Capital Gains and Losses U.S. Income Tax Return of a Foreign Corporation U.S. Income Tax Return of a Foreign Sales Corporation U.S. Income Tax Return for Homeowners Associations U.S. Income Tax Return for Certain Political Organizations U.S. Income Tax Return for Real Estate Investment Trusts U.S. Income Tax Return for Regulated Investment Companies U.S. Income Tax Return for an S Corporation Capital Gains and Losses and Built-In Gains Shareholder's Share of Income, Deductions, Credits, etc. Estimated Tax for Corporations Amended U.S. Corporation Income Tax Return Application to Adopt, Change, or Retain a Tax Year	100 100 100 100 100 100 100 100 100S Sch D (100S) Sch K-1 (100S) 100-ES 100X None	No No No No No No No No No No No No No Yes
1310 2106 2106-EZ 2120 2210 2210F 2220 2350 2441 2678 2848 3115 3468 3903 4137 4255 4419 4461 4466 4506  4562	Statement of Person Claiming Refund Due a Deceased Taxpayer Employee Business Expenses Unreimbursed Employee Business Expenses Multiple Support Declaration Underpayment of Estimated Tax by Individuals, Estates and Trusts Underpayment of Estimated Tax by Farmers and Fishermen Underpayment of Estimated Tax by Corporations Application for Extension of Time to File U.S. Income Tax Return Child and Dependent Care Expenses Employer/Payer Appointment of Agent Power of Attorney and Declaration of Representative Application for Change in Accounting Method Investment Credit Moving Expenses Social Security and Medicare Tax on Unreported Tip Income Recapture of Investment Credit Application for Filing Information Returns Magnetically/Electronically Application for Approval of Master or Prototype or Volume Submitter Defined Contribution Plan Corporation Application for Quick Refund of Overpayment of Estimated Tax Request for Copy of Tax Return  Depreciation and Amortization	None None None None FTB 5805 FTB 5805F FTB 5806 Not applicable FTB 3506 None FTB 3520 None Not applicable Not applicable FTB 4092 None Not applicable FTB 3516 FTB 3885 FTB 3885A FTB 3885F (541) FTB 3885L (568) FTB 3885P (565)	Yes Yes Yes Yes No No No Not applicable No Yes Yes Yes Not applicable Yes Yes Not applicable No No No No No No
4626 4669 4670 4684 4797 4804	Alternative Minimum Tax — Corporations Statement of Payments Received Request for Relief from Payment of Income Tax Withholding Casualties and Thefts Sales of Business Property Transmittal of Information Returns Reported Magnetically	Sch P (100) None None None Sch D-1 FTB 3601	No Yes Yes Yes No No
4835 4852  4868	Farm Rental Income and Expenses 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. Application for Automatic Extension of Time to File U.S. Individual Income Tax Return	None FTB 3525  Not applicable	Yes No  Not applicable

FEDERAL FORM NUMBER	FEDERAL FORM – Title or Description	RELATED CALIFORNIA FORM (FTB FORM unless noted)	MAY USE FEDERAL FORM See Notes
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		
5405	First-Time Homebuyer Credit and Repayment of the 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 Corporation Engaged in a U.S. Trade or Business	None	Yes
5498	IRA Contribution Information	None	Yes
5500	Annual Return/Report of Employee Benefit Plan	Not applicable	Not applicable
5754	Statement by Person(s) Receiving Gambling Winnings	None	Yes
5884	Work Opportunity Credit	None	No
6198	At-Risk Limitations	None	Yes
6251	Alternative Minimum Tax — Individuals	{ Sch P (540) Sch P (540NR)	No
6252	Installment Sale Income	FTB 3805E	No
6765	Credit for Increasing Research Activities	FTB 3523	No
7004	Application for Automatic 6-Month 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 U.S. Real Property Interests	593	No
8288-A	Statement of Withholding on 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-OL	U.S. Individual Income Tax Declaration for an IRS e-file Online Return	FTB 8453-OL	No
8453-C	U.S. Corporation Income Tax Declaration for an IRS e-file Return	FTB 8453-C	No
8453-PE	U.S. Partnership Declaration for an IRS e-file Return	FTB 8453-P	No
8582	Passive Activity Loss Limitations	FTB 3801	No
8582-CR	Passive Activity Credit Limitations	FTB 3801-CR	No
8586	Low-Income Housing Credit	FTB 3521	No
8615	Tax for Certain Children Who Have Investment Income of More Than \$1,900	FTB 3800	No
8633	Application to Participate in the IRS e-file Program	Not applicable	Yes
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
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 (Section 1446)	592-A	No
8814	Parent's Election To Report Child's Interest and Dividends	FTB 3803	No
8821	Tax Information Authorization	FTB 3520	Yes
8822	Change of Address	FTB 3533	Yes
8824	Like-Kind Exchanges	None	Yes
8826	Disabled Access Credit	FTB 3548	No
8827	Credit for Prior Year Minimum Tax — Corporations	Sch P (100)	No
8830	Enhanced Oil Recovery Credit	FTB 3546	No
8839	Qualified Adoption Expenses	FTB 5123	No
8842	Election to Use Different Annualization Periods for Corporate Estimated Tax	None	Yes
8869	Qualified Subchapter S Subsidiary Election	None	Yes
9465	Installment Agreement Request	FTB 3567	No

## Notes

**No** California form must be used.

**\*\*** Form number may vary based on industry-specific registration.

**Yes** 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.

**Not applicable** Federal form is not applicable to California tax or California form is not applicable for federal tax.

**Yes<sup>1</sup>** 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 Form 1096 and filed with the FTB.