

# 2014 CALIFORNIA TAX FORMS AND RELATED FEDERAL FORMS

FRANCHISE TAX BOARD (FTB) FORMS	CALIFORNIA FORM – Title or Description	RELATED FEDERAL FORM	MAY USE FEDERAL FORM <small>See Notes</small>
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 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 Corps and Exempt Orgs 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
Sch QS (100S)	Qualified Subchapter S Subsidiary (QSub) Information Worksheet	None	Not applicable
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 Tax Statement	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.	4852	Yes
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 1067A	Nonresident Group Return Schedule	None	Not applicable
FTB 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
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
Sch P (541)	Alternative Minimum Tax and Credit Limitations – Fiduciaries	Sch I (1041)	No

FTB FORMS	CALIFORNIA FORM – Title or Description	RELATED FEDERAL FORM	MAY USE FEDERAL FORM See Notes
541-A	Trust Accumulation of Charitable Amounts	1041-A	No
541-B	Charitable Remainder and Pooled Income Trusts	5227	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
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	No
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 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	1042S, 8805	No
592-F	Foreign Partner or Member Annual Return	1042, 8804	No
592-V	Payment Voucher for Resident and Nonresident Withholding	None	Not applicable
593	Real Estate Withholding Tax Statement	8288, 8288-A	No
593-C	Real Estate Withholding Certificate	8288-B	Not applicable
593-E	Real Estate Withholding — Computation of Estimated Gain or Loss	None	Not applicable
593-I	Real Estate Withholding Installment Sale Acknowledgement	None	Not applicable
593-V	Payment Voucher for Real Estate Withholding	None	Not applicable
FTB 3500	Exemption Application	1023, 1023-EZ, 1024	No
FTB 3500A	Submission of Exemption Request	1023, 1023-EZ, 1024	No
FTB 3503	Natural Heritage Preservation Credit	None	Not applicable
FTB 3506	Child and Dependent Care Expenses Credit	2441	No
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 3511	Environmental Tax Credit	None	Not applicable
FTB 3516 (Side 1)	Request for Copy of Personal Income Tax or Fiduciary Return	4506	No
FTB 3516 (Side 2)	Request for Copy of Corporation, Exempt Organization, Partnership, or Limited Liability Company Return	4506	No
FTB 3519	Payment for Automatic Extension for Individuals	None	Not applicable
FTB 3520	Power of Attorney Declaration	2848, 8821	Yes
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 3533	Change of Address	8822	Yes
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 Corps and Exempt Orgs	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	Election to Assign Credit Within Combined Reporting Group	None	Not applicable
FTB 3544A	List of Assigned Credit Received and/or Claimed by Assignee	None	Not applicable
FTB 3546	Enhanced Oil Recovery Credit	3800	No
FTB 3547	Donated Agricultural Products Transportation Credit	None	Not applicable
FTB 3548	Disabled Access Credit for Eligible Small Businesses	8826	No
FTB 3551	Sale of Credit Attributable to an Independent Film	None	Not applicable
FTB 3554	New Employment Credit	None	Not applicable

<b>FTB FORMS</b>	<b>CALIFORNIA FORM – Title or Description</b>	<b>RELATED FEDERAL FORM</b>	<b>MAY USE FEDERAL FORM</b> See Notes
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 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 Corps and Exempt Orgs 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 3589	Nonprofit Organization Report of Funds Received and Used for Campaign Activity	990, 990-EZ	No
FTB 3601	Transmittal of Annual 1098, 1099, 5498, W-2G Information	None	No
FTB 3604	Transmittal of Paperless Schedules K-1 (565 or 568) on CD or Diskette	None	Not applicable
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 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	5329	No
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 3811	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***
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-EO	California e-file Return Authorization for Exempt Organizations	8453-EO	No
FTB 8453-FID	California e-file Return Authorization for Fiduciaries	8453-F	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 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
<b>Employment Development Department (EDD) FORMS</b>	<b>CALIFORNIA FORM – Title or Description</b>	<b>RELATED FEDERAL FORM</b>	<b>MAY USE FEDERAL FORM</b> 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 9	Quarterly Contribution Return and Report of Wages	941	No
DE 9C	Report on the Quarterly Contribution and Report of Wages (Continuation)	941	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	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
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 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 (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 FTB 3500A	No No
1023 EZ	Streamlined Application for Recognition of Exemption Under Section 501(c)(3) of the Internal Revenue Code	{ FTB 3500 FTB 3500A	No No
1024	Application for Recognition of Exemption Under Section 501(a)	{ FTB 3500 FTB 3500A	No 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	None	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 — Estates and Trusts	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, 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
1099-B	Proceeds From Broker and Barter Exchange Transactions	None	Yes
1099-C	Cancellation of Debt	None	Yes
1099-DIV	Dividends and Distributions	None	Yes



FEDERAL FORM NUMBER	FEDERAL FORM – Title or Description	RELATED CALIFORNIA FORM (FTB FORM unless noted)	MAY USE FEDERAL FORM See Notes
1099-G	Certain Government Payments	None	Yes
1099-INT	Interest Income	None	Yes
1099-LTC	Long-Term Care and Accelerated Death Benefits	None	Yes
1099-MISC	Miscellaneous Income	None	Yes
1099-SA	Distributions From an HSA, Archer MSA, or Medicare Advantage MSA	None	Yes
1099-OID	Original Issue Discount	None	Yes
1099-PATR	Taxable Distributions Received From Cooperatives	None	Yes
1099-R	Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.	None	Yes
1120	U.S. Corporation Income Tax Return	100	No
Sch D (1120)	Capital Gains and Losses	100	No
1120F	U.S. Income Tax Return of a Foreign Corporation	100	No
1120-FSC	U.S. Income Tax Return of a Foreign Sales Corporation	100	No
1120-H	U.S. Income Tax Return for Homeowners Associations	100	No
1120-IC-DISC	Interest Charge Domestic International Sales Corporation Return	100	No
1120-POL	U.S. Income Tax Return for Certain Political Organizations	100	No
1120-REIT	U.S. Income Tax Return for Real Estate Investment Trusts	100	No
1120-RIC	U.S. Income Tax Return for Regulated Investment Companies	100	No
1120S	U.S. Income Tax Return for an S Corporation	100S	No
Sch D (1120S)	Capital Gains and Losses and Built-In Gains	Sch D (100S)	No
Sch K-1 (1120S)	Shareholder's Share of Income, Deductions, Credits, etc.	Sch K-1 (100S)	No
Sch M-3	Net Income (Loss) Reconciliation for Corporations With Total Assets of \$10 Million or More	None	No
Sch UTP	Uncertain Tax Position Statement	None	Yes
1120-W	Estimated Tax for Corporations	100-ES	No
1120X	Amended U.S. Corporation Income Tax Return	100X	No
1125-A	Cost of Goods Sold	100	No
1125-E	Compensation of Officers	100	No
1128	Application to Adopt, Change, or Retain a Tax Year	None	Yes
1310	Statement of Person Claiming Refund Due a Deceased Taxpayer	None	Yes
2106	Employee Business Expenses	None	Yes
2106-EZ	Unreimbursed Employee Business Expenses	None	Yes
2120	Multiple Support Declaration	None	Yes
2210	Underpayment of Estimated Tax by Individuals, Estates and Trusts	FTB 5805	No
2210F	Underpayment of Estimated Tax by Farmers and Fishermen	FTB 5805F	No
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
2441	Child and Dependent Care Expenses	FTB 3506	No
2678	Employer/Payer Appointment of Agent	None	Yes
2848	Power of Attorney and Declaration of Representative	FTB 3520	Yes
3115	Application for Change in Accounting Method	None	Yes
3468	Investment Credit	Not applicable	Not applicable
3800	General Business Credit	FTB 3546	No
3903	Moving Expenses	None	Yes
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)	FTB 4092	Yes
4461	Application for Approval of Master or Prototype or Volume Submitter Defined Contribution Plan	None	Yes
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
		FTB 3885A	No
4562	Depreciation and Amortization	FTB 3885F (541)	No
		FTB 3885L (568)	No
		FTB 3885P (565)	No
4626	Alternative Minimum Tax — Corporations	Sch P (100)	No
4669	Statement of Payments Received	None	Yes
4670	Request for Relief from Payment of Income Tax Withholding	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 From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, Etc.	FTB 3525	Yes
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

FEDERAL FORM NUMBER	FEDERAL FORM – Title or Description	RELATED CALIFORNIA FORM (FTB FORM unless noted)	MAY USE FEDERAL FORM See Notes
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 Corporation Engaged in a U.S. Trade or Business	None	Yes
5498	IRA Contribution Information	None	Yes
5754	Statement by Person(s) Receiving Gambling Winnings	None	Yes
5884	Work Opportunity Credit	Not applicable	Not applicable
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 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
8288-B	Application for Withholding Certificate for Dispositions by Foreign Persons of U.S. Real Property Interests	593-C	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	8453-EO	No
8453-F	U.S. Estate or Trust Income Tax Declaration and Signature for Electronic Filing	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	8453-C	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
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 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 3520	Yes
8822	Change of Address	FTB 3533	Yes
8824	Like-Kind Exchanges	FTB 3840	Yes***
8826	Disabled Access Credit	FTB 3548	No
8827	Credit for Prior Year Minimum Tax — Corporations	Sch P (100)	No
8839	Qualified Adoption Expenses	None	Not applicable
8842	Election to Use Different Annualization Periods for Corporate Estimated Tax	None	Yes
8869	Qualified Subchapter S Subsidiary Election	None	Yes
8879	IRS e-file Signature Authorization	8879	No
8879-F	IRS e-file Signature Authorization for Form 1041	8879-FID	No
8940	Request for Miscellaneous Determination	None	Not applicable
9465	Installment Agreement Request	FTB 3567	No

## Notes

**No** California form must be used.

**\*\*** 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.

**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.