

Acceptable Forms and Occurrences for CA Fiduciary e-file

The following chart lists the acceptable Fiduciary forms and schedules that may be e-filed with FTB and the maximum number of each type of form or schedule allowed per return.

Form/ Schedules	Max. # per return	Title
Form 541	1	California Fiduciary Income Tax Return
Form 592-B	Unbounded	Resident and Nonresident Withholding Tax Statement
Form 593	Unbounded	Real Estate Withholding Tax Statement
Form 3503	Unbounded	Natural Heritage Preservation Credit
Form 3507	Unbounded	Prison Inmate Labor Credit
Form 3510	1	Credit for Prior Year Alternative Minimum Tax
Form 3511	1	Environmental Tax Credit
Form 3521	1	Low-Income Housing Credit
Form 3523	1	Research Credit
Form 3526	1	Investment Interest Expense Deduction
Form 3531	Unbounded	California Competes Tax Credit
Form 3540	1	Credit Carryover and Recapture Summary
Form 3541	Unbounded	California Motion Picture and Television Production Credit
Form 3546	1	Enhanced Oil Recovery Credit
Form 3547	1	Donated Agricultural Products Transportation Credit
Form 3548	Unbounded	Disabled Access Credit for Eligible Small Businesses
Form 3554	Unbounded	New Employment Credit
Form 3592	Unbounded	College Access Tax Credit
Form 3801	1	Passive Activity Loss Limitations
Form 3801-CR	1	Passive Activity Credit Limitations
Form 3805-E	Unbounded	Installment Sale Income
Form 3805-V	1	Net Operating Loss (NOL) Computation and NOL and Disaster Loss Limitations
Form 3805-Z	Unbounded	Enterprise Zone Deduction and Credit Summary
Form 3806	Unbounded	Los Angeles Revitalization Zone Net Operating Loss (NOL) Carryover Deduction
Form 3807	Unbounded	Local Agency Military Base Recovery Area Deduction and Credit Summary
Form 3808	Unbounded	Manufacturing Enhancement Area Credit Summary

Form/ Schedules	Max. # per return	Title
Form 3809	Unbounded	Targeted Tax Area Deduction and Credit Summary
Form 3811	1	Donated Fresh Fruits or Vegetables Credit
Form 3840	Unbounded	California Like-Kind Exchanges
Form 3885-F	Unbounded	Depreciation and Amortization
Form 5805	1	Underpayment of Estimated Tax by Individuals and Fiduciaries
Form 5805-F	1	Underpayment of Estimated Tax by Farmers and Fishermen
Form 5806	Unbounded	Underpayment of Estimated Tax by Corporations
Form 5870-A	1	Tax on Accumulation Distribution of Trusts
Schedule D (541)	1	Capital Gain or Loss
Schedule D-1 (541)	1	Sales of Business Property
Schedule G-1 (541)	Unbounded	Tax on Lump-Sum Distributions
Schedule J (541)	1	Trust Allocation of an Accumulation Distribution
Schedule K-1 (541)	Unbounded	Beneficiary's Share of Income, Deductions, Credits, etc.
Schedule P (541)	1	Alternative Minimum Tax and Credit Limitations - Fiduciaries
Schedule S (541)	Unbounded	Other State Tax Credit
Form W-2	Unbounded	Wage and Tax Statement
Form IRS 1099-R	Unbounded	Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRA's, Insurance Contracts, etc.
Form IRS 8886	Unbounded	Reportable Transaction Disclosure Statement
Form IRS W-2G	Unbounded	Certain Gambling Winnings
IRS Statement	1	Grantor Type Trust Income and Deductions Statement