
ULTRATAX CS™

OK

OKLAHOMA STATE PRODUCTS

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

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

STATE PRODUCT PROFILE

- Oklahoma Individual
- Oklahoma Corporate (includes S Corp)
- Oklahoma Partnership
- Oklahoma Fiduciary

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

The Oklahoma line-up for UltraTax CS includes the Oklahoma Individual, Corporate (includes S Corp), Partnership, and Fiduciary programs.

ULTRATAX/1040

Multi-state processing

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

OKLAHOMA INDIVIDUAL

Oklahoma Forms and Schedules

Form 504—Application for Extension of Time to File OK Income Return

Form 505—Injured Spouse Claim and Allocation

Form 506*—Investment/New Jobs Credit

Form 507—Oklahoma Statement of Claimant Refund Due Deceased Taxpayer

Form 511—Oklahoma Resident Individual Income Tax Return

Form 511-NOL—Oklahoma NOL Full-Year Resident Schedule A & B

Form 511-NR—Oklahoma Nonresident/ Part-Year Individual Income Tax Return

Form 511-NR-NOL*—Oklahoma NOL NR/PY Schedule A & B

Form 511CR—Oklahoma Income Tax Other Credits Form

Form 511-EF—Electronic Filing Declaration

Form 511-V—Individual Income Tax Payment Voucher

Form 511X—Amended Resident Individual Income Tax Return

Form 520*—Oklahoma Agricultural Producer Credit

Form 528*—Oklahoma Information Return Agriculture Exclusion

Form 538-H—Oklahoma Claim for Credit or Refund of Property Tax

Form 538-S—Oklahoma Claim for Credit or Refund of Sales Tax

Form OW-8-ES—Oklahoma Individual Estimated Tax

Form OW-8-P—Oklahoma Underpayment of Estimated Tax Worksheet

Form OW-8-P-Sup-I—Annualized Income Installment Method for Individuals

Form 527-A*—Small Business Capital Company Report for Investors

Form 526-A*—Rural Small Business Capital Company Report for Investors

Form 529* Small Business Guaranty Fee Credit

Form 562*—Film or Music Project Credit

Form 563*—Research and Development Jobs Credit

Form 599*—Request for Copy of Income Tax Return

Form BT-129—Power of Attorney

Form 511TX—Credit for Tax Paid to Another State

Form 573—Farm Income Averaging

Form 561—Oklahoma Capital Gain Deduction

Form 561NR—Oklahoma Capital Gain Deduction Part Year and Nonresidents

Form 574*—Resident/Nonresident Allocation

OKLAHOMA CORPORATE

With the UltraTax/1120 Oklahoma program, you can process both C and S Corporation returns.

Oklahoma Forms and Schedules

Form 500-B—Information Return-Report of Nonresident Member Income Tax Withheld

Form 501—Annual Information Return

Form 504—Application for Extension of Time to File an Oklahoma Income Tax Return

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*Denotes non-calculating form

**Denotes 1120 Consolidated form

ULTRATAX CS – OKLAHOMA, CONT.

Form 506*—Investment/New Jobs Credit
Form 511CR—Other Credits Form
Form 512—Corporation Income Tax Return
Form 512S—Small Business Corporation Income Tax Return
Form 512E—Return of Organization Exempt from Income Tax
Form 512SA—Nonresident Shareholder Agreement
Form 512X—Amended Corporation Income Tax Return
Form OW-8-ESC—Oklahoma Corporate Estimated Tax
Form OW-8-P—Underpayment of Estimated Tax Worksheet
Form OW-8-P-SUP-C—Oklahoma Annualized Income Installment Method for Corporations and Trusts
Form 561C—Oklahoma Capital Gain Deduction
Form 561S—Oklahoma Capital Gain Deduction
Form 512-TI—Computation of Oklahoma Consolidated Taxable Income
Form OW-9-C—Nonresident Oklahoma Distributed Income Withholding Tax Annual Report
Form OW-9-EW—Nonresident Oklahoma Distributed Income Estimated Withholding Tax Report
Form OW-9-P—Nonresident Oklahoma Distributed Income Withholding Tax Penalty and Interest Worksheet
Form OW-11*—Registration for Oklahoma Withholding for Nonresident Members
Form OW-15—Nonresident Member Withholding Exemption Affidavit
Form OW-15-A*—Transmittal of Nonresident Member Withholding Exemption Affidavit
Form BT-129 —Power of Attorney
Form 200—Oklahoma Annual Franchise Tax Return
Form 215—Oklahoma Minimum/Maximum Franchise Tax Return Schedule A—Current Officer Information
Form 203 SCH—Schedule B, C, D, and Balance Sheet
Form 200F—Request to Change Franchise Tax Filing Period Depreciation Adjustment Worksheet

OKLAHOMA PARTNERSHIP

The UltraTax/1065 Oklahoma program:

- Allows for the allocation of Oklahoma amounts to specific partners
- Integrates with UltraTax Oil & Gas module to calculate Oklahoma depletion allowances

Oklahoma Forms and Schedules

Form 500B—Information Return Report of Nonresident Member Income Tax Withheld
Form 501—Annual Information Return
Form 504—Application for Extension of Time to File Oklahoma Income Tax Return
Form 506*—Investment/New Jobs Credit
Form 514—Partnership Income Tax Return
Form 514-PT—Partnership Composite Income Tax Supplement Partner K-1 Worksheet—Partner’s Share of Income and Credits Worksheet
Form BT-129—Power of Attorney
Form 511 CR*—Other Credits Form
Form 561-P—Oklahoma Capital Gain Deduction
Form OW-8-ESC—Corporate Estimated Tax
Form OW-8-P—Underpayment of Estimated Tax Worksheet
Form OW-8-P-SUP-C—Annualized Income Installment Method for Corporations and Trusts
Form OW-9-C—Nonresident Oklahoma Distributed Income Withholding Tax Annual Report
Form OW-9-P—Nonresident Oklahoma Distributed Income Withholding Tax Penalty and Interest Worksheet
Form OW-9-EW—Nonresident Oklahoma Distributed Income Estimated Withholding Tax Report
Form OW-11*—Registration for Oklahoma Withholding for Nonresident Members
Form OW-15—Nonresident Member Withholding Exemption Affidavit
Form OW-15-A*—Transmittal of Nonresident Member Withholding Exemption Affidavit

OKLAHOMA FIDUCIARY

Multi-state processing

UltraTax/1041 has extensive multi-state processing capabilities with the ability to process several states from one set of federal data.

Oklahoma Forms and Schedules

Form 513—Resident Fiduciary Return of Income
Form 513NR—Nonresident Fiduciary Return of Income
Form 500-B—Report of Nonresident Member Income Tax Withheld
Form 501—Annual Information Return
Form 504—Application for Extension of Time to File an Oklahoma Income Tax Return

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ULTRATAX CS – OKLAHOMA, CONT.

Form 506*—Investment/New Jobs Credit
Form 511CR*—Other Credits Form
Form 561F*—Capital Gain Deduction for Trusts and Estates
Filing Form 513
Form 561NR-F*—Capital Gain Deduction for Trusts and Estates
Filing Form 513NR
Form BT-129—Power of Attorney
Form OW-8-ESC—Corporate Estimated Tax
Form OW-8-P (page one only)—Underpayment of Estimated
Tax Worksheet
Form OW-8-P-SUP-C (page two only)—Oklahoma Annualized
Income Installment Method for Corporations and Trusts
Form OW-9-C—Nonresident Oklahoma Distributed Income
Withholding Tax Annual Report
Form OW-9-EW—Nonresident Oklahoma Distributed Income
Estimated Withholding Tax Report
Form OW-9-P—Nonresident Oklahoma Distributed Income
Withholding Tax Penalty and Interest Worksheet
Form OW-11*—Registration for Oklahoma Withholding
for Nonresident Members
Form OW-15—Nonresident Member Withholding
Exemption Affidavit
Form OW-15-A*—Transmittal of Nonresident Member
Withholding Exemption Affidavit
Schedule K-1 Equivalent—Beneficiary’s Share of Income,
Adjustments, etc.
Grantor / Agency Report—Grantor’s Share of Income,
Adjustments, etc.
Depreciation Adjustments Worksheet

SUPPORT

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

MONEY-BACK GUARANTEE

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

PER-RETURN PRICING (PRP)

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

MORE INFORMATION

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

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