
ULTRATAX CS™

CALIFORNIA STATE PRODUCTS

The UltraTax CS programs for Massachusetts 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.

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 Massachusetts line-up for UltraTax CS includes the Massachusetts 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.

MASSACHUSETTS INDIVIDUAL

Massachusetts Forms and Schedules

Form 1—Massachusetts Resident Income Tax Return

Form 1-NR/PY—Nonresident & Part-Year Resident Income Tax Return

Form 1-ES—Estimated Tax Payment Vouchers

Form CA-6—Application for Abatement/Amended Return

Form EFO—Personal Income Tax Declaration of Paper Filing

Form M-1310—Statement of Claimant to Refund Due a Deceased Taxpayer

Form M-2210—Underpayment of Massachusetts Estimated Income Tax

Form M-2210A—Annualized Income Installment Worksheet

Form M-2848—Power of Attorney and Declaration of Representative

Form M-4506*—Request for Copy of Tax Form

Form M-4868—Application for Automatic Six-month Extension of Time to File Massachusetts Income Tax (for Composite Filing)

Form M-8379—Nondebtor Spouse Claim and Allocation for Refund Due

Form M-8453—Individual Income Tax Declaration for Electronic Filing

Form PV—Massachusetts Income Tax Payment Voucher

Individual Certificate HRC—Historic Rehabilitation Credit

MA

STATE PRODUCT PROFILE

- Massachusetts Individual
 - Massachusetts Corporate (includes S Corp)
 - Massachusetts Partnership
 - Massachusetts Fiduciary
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Schedule B—Interest, Dividends and Certain Capital Gains and Losses

Schedule BC*—Brownfields Credit

Schedule C—Massachusetts Profit or Loss from Business

Schedule C-2—Excess Deductions Against Trade or Business Income

Schedule CB—Circuit Breaker Credit

Schedule D—Long-Term Capital Gains and Losses Excluding Collectibles

Schedule D-IS—Long Term Capital Gains and Losses Excluding Collectibles

DI—Dependent Information

Schedule E—Reconciliation of Income or Loss from Real Estate, Royalties, Partnerships, S Corporations, Estates, Trusts, REMICs, and Farm Income

Schedule EC—Solar and Wind Energy Credit

Schedule E-1—Income or Loss from Real Estate and Royalties

Schedule E-2—Income or Loss from Partnerships and S Corporations

Schedule E-3—Income or Loss from Estates, Trusts, EEMICs, and Farm Income

Schedule FEC*—Full Employment Credit

Schedule HC—Health Care Information

Schedule HC-CS—Health Care Continuation Sheet

Schedule INC—Forms W-2 and 1099 Information

Schedule LP—Credit for Removing or Covering Lead Paint on Residential Premises

Schedule NTS-L-NR/PY—No Tax Status and Limited Income Credit

Schedule R/NR—Resident/ Nonresident Worksheet

Schedule SC—Septic Credit

Schedule TDS*—Taxpayer Disclosure Statement

Schedules X and Y—Other Income and Other Deductions

Schedule Z—Other Credits

Taxpayer Change of Address

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*Denotes non-calculating form

**Denotes 1120 Consolidated form

ULTRATAX CS – MASSACHUSETTS, CONT.

MASSACHUSETTS CORPORATE

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

Massachusetts Forms and Schedules

Form 355-7004—Application for Corporate Extension

Form 355-ES—Corporate Estimated Tax Payment Voucher

Form 355—Business or Manufacturing Corporation Excise Return

Form 355Q*—Statement Relating to Manufacturing Activities

Form 355S—S Corporation Excise Return

Form 355SC—Domestic or Foreign Security Corporation Return

Form 355SV*—Taxation of Ships and Vessels

Form 355U**—Income Excise for Taxpayers

Subject to Combine Reporting

Form 355-PV—Corporate Tax Payment Voucher

Form 355S-PV—Corporate Tax Payment Voucher

Form AA-1—Application for Section 42 Method of Apportionment

Form CA-6—Application for Abatement/Amended Return

Form D—Limited Liability Company Annual Report

Form DF—Annual Report for Domestic and Foreign Corporations

Form F—Foreign Limited Liability Company Annual Report

Form FP—Foreign Professional Limited Liability Company Annual Report

Form F-2*—Apportionment Report

Form M-2220—Underpayment of Massachusetts Estimated Tax by Corporations

Form M-2848—Power of Attorney and Declaration of Representative

Form M-8453C—Corporate Tax Declaration for Electronic Filing

Form P—Professional Limited Liability Company Annual Report

Form PC/FPC—Annual Report for Professional and Foreign Professional Corporations

Schedule A-1—Investments in Subsidiaries

Schedule A-2—Intercompany Receivables

Schedule A-3—Intercompany Payables

Schedule ABI—Exceptions to the Add Back of Interest Expenses

Schedule ABIE—Exceptions to the Add Back of Intangible Expenses

Schedule BC*—Brownfields Credit

Schedule CIR**—Consolidated Income Reconciliation

Schedule D-IS*—Long Term Capital Gains and Losses Excluding Collectibles

Schedule EOAC*—Economic Opportunity Area Credit

Schedule E-2—Loss Carryover Deduction

Schedule F—Income Apportionment

Schedule FEC*—Full Employment Credit

Schedule H*—Investment Tax Credit & Carryovers

Schedule H-2*—Credit Recapture

Schedule H-2 ROW*—Recapture Offset Worksheet

Schedule HM*—Harbor Maintenance Tax Credit

Schedule A-HRC*—Allotment HRC Historic Rehabilitation Credit Summary

Schedule IC-HRC*—Individual Certificate HRC Historic Rehabilitation Credit

Schedule T-HRC*—Transfer/Sale HRC Historic Rehabilitation Credit Certificate

Schedule A-LIHC*—Allotment LIHC Low-income Housing Credit Summary

Schedule C-LIHC*—Certificate LIHC Low-Income Housing Credit Allotment

Schedule EE-LIHC*—Early Election LIHC Low-income Housing Credit Notification

Schedule T-LIHC*—Transfer LIHC Low-income Housing Credit Statement

Schedule M-1—Book to Tax Reconciliation

Schedule NIR—Net Income Reconciliation

Schedule RC*—Research Credit

Schedule RFC*—Refundable Film Credit

Schedule RNW—REIT Net Worth Calculation

Schedule S—S Corporation Distributive Income

Schedule SK-1—Shareholder's Massachusetts Information

Schedule TDS*—Taxpayer Disclosure Statement

Schedule U-CI**—Combined Income

Schedule U-CS**—Credits Shared From Other Members

Schedule U-E**—Massachusetts Unitary or Affiliated Group Income

Schedule U-E-1**—Member's Dividend Deduction

Schedule U-E-2**—Member's Net Operation Loss Carryover

Schedule U-E-2S**—Member's Shared Loss Carryover

Schedule U-IC*—Member's Individual Credits

Schedule U-M**—Member's Income and Expenses

Schedule U-MSI**—Member's Apportioned Share of Group Income

Schedule U-MTI**—Members Non-Unitary Taxable Income

Schedule U-NI**—Summary of all Group Net Income

Schedule U-ST**—Member's Separate Income Tax

Schedule VP*—Vanpool Credit

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ULTRATAX CS – MASSACHUSETTS, CONT.

Schedule LP*—Credit for Removing or Covering Lead Paint on Residential Premises

Form 3M—Income Tax Return for Clubs and Other Organizations not Engaged in Business for Profit (for Homeowner Associations)

Form M-2210—Underpayment of Massachusetts Estimated Income Tax

Form M-8736 – Application for Extension of Time to File Fiduciary, Partnership or Corporate Trust Return

Form 2-ES – Estimated Tax Payment

Form MT-1—MA Annual Report of Voluntary Associations and Trusts

Form 1-NR/PY—MA Nonresident / Part-Year Resident Income Tax Return (for Composite Filing)

Form PV—Massachusetts Income Tax Payment Voucher

Schedule B—Interest and Dividend Income/Short-Term Capital Gains/Losses and Long-Term Gain on Collectibles

Schedule D—Long-Term Capital Gains and Losses Excluding Collectibles

Schedule E—Rent, Royalty, and REMIC Income or Loss/Income from Pass-Throughs

Form M-4868—Application for Automatic Six-month Extension of Time to File Massachusetts Income Tax (For Composite Filing)

Depreciation Disposal Worksheet

MASSACHUSETTS PARTNERSHIP

The UltraTax/1065 Massachusetts program:

- Allows the allocation of Form 3 amounts to specific partners
- Automatically calculates the nonresidents' apportioned share of Schedule 3K-1 amounts
- Reconciles partners' capital accounts automatically for Massachusetts purposes.

Massachusetts Forms and Schedules

Form 1-NR/PY—Nonresident Part-Year Resident Income Tax Return (for Composite Filing)

Form 3—Partnership Return of Income

Form M-2210—Underpayment of Massachusetts Estimated Income Tax (for Composite Filing)

Form M-2848—Power of Attorney and Declaration of Representative

Form M-4868—Application for Automatic Six-month Extension (for Composite Filing)

Form M-8453P—Partnership Tax Declaration for Electronic Filing

Form M-8736—Application for Extension of Time to File Fiduciary, Partnership, or Corporate Trust Return

Form PV—Massachusetts Income Tax Payment Voucher (for Composite Filing)

Form PTE-EX—Withholding Exemption Certificate

Form CRFS—Composite Return Filing Statement

Withholding Estimates Worksheet

Allotment HRC*—Historic Rehabilitation Credit Summary

Allotment LIHC*—Low Income Housing Credit Summary

Certificate LIHC*—Low-Income Housing Credit Allotment

Early Election LIHC*—Low-Income Housing Credit Notification

Individual Certificate HRC*—Historic Rehabilitation Credit

Schedule 3K-1—Partner's Massachusetts Information

Schedule BC*—Brownfields Credit

Schedule EOAC*—Economic Opportunity Area Credit

Schedule FEC*—Full Employment Credit

Schedule H-2*—Credit Recapture

Schedule RFC*— Refundable Film Credit

Schedule TDS*—Taxpayer Disclosure Statement

Transfer/Sale HRC*—Historic Rehabilitation Credit Certificate

Transfer LIHC*—Low-Income Housing Credit Statement

Schedule B—Interest, Dividends and Certain Capital Gains and Losses (for Composite Filing)

Schedule D—Long-term Capital Gains and Losses, Excluding Collectibles (for Composite Filing)

Schedule E—Income or Loss from Rental, Royalty, REMIC, Partnerships, S-Corporations, Grantor-Type Trusts, and Non-Massachusetts Estates and Trusts (for composite filing)

Partnership E-File Mandate Worksheet

Depreciation Disposal Worksheet

Annual Reports:

Form D—Limited Liability Company Annual Report

Form F—Foreign Limited Liability Company Annual Report

Form P—Professional Limited Liability Company Annual Report

Form FP—Foreign Professional Limited Liability Company Annual Report

Form D—Limited Partnership Annual Report

Form F—Foreign Limited Partnership Annual Report

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MASSACHUSETTS 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.

Massachusetts Forms and Schedules

Form 2—Fiduciary Income Tax Return
Form 2G—Grantor's/Owner's Share of a Grantor-Type Trust
Form 2-ES—Estimated Tax Payment
Form 2-PV—Fiduciary Tax Payment Voucher
Form CA-6—Application for Abatement / Amended Return
Form M-2210A—Annualized Income Installment Worksheet
Form M-2210F—Underpayment of Massachusetts Estimated Income Tax for Fiduciaries
Form M-2848—Power of Attorney and Declaration of Representative
Form M-8453F—Fiduciary Tax Declaration for Electronic Filing
Form M-8736—Application for Extension of Time to File Fiduciary, Partnership or Corporate Trust Return
Form PTE-EX*—Withholding Exemption Certificate for Members of a Pass-through Entity
Schedule 2K-1—Beneficiary's Massachusetts Information
Schedule B—Interest, Dividends and Certain Capital Gains and Losses
Schedule BC*—Brownfields Credit
Schedule B/R—Beneficiary/Remaindermen
Schedule C-2—Excess Deductions Against Trade or Business Income
Schedule D—Capital Gains and Losses
Schedule D-IS*—Long-Term Capital Gains and Losses Excluding Collectibles
Schedules E and F—Rental Income or Loss and Credit for Taxes Paid
Schedule EOAC*—Economics Opportunity Area Credit
Schedule H—Expenses and Fiduciary Compensation
Schedule H-2*—Credit Recapture
Schedule IDD—Income Distribution Deduction
Schedule TDS*—Taxpayer Disclosure Statement
Allotment LHC—Low Income Housing Credit Summary
Taxpayer Change of Address*

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 return.

MORE INFORMATION

UltraTax CS products for Massachusetts 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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