
ULTRATAX CS™

NY

NEW YORK STATE PRODUCTS

The UltraTax CS programs for New York 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

- New York Individual
- New York Corporate (includes S Corp)
- New York Partnership
- New York Fiduciary
- New York Estate
- New York Exempt

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 New York line-up for UltraTax CS includes the New York Individual, Corporate (including S Corp), Partnership, Fiduciary, Estate, and Exempt 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.

NEW YORK INDIVIDUAL

The UltraTax/1040 New York program includes the New York State, New York City, and Yonkers Forms.

New York State Forms

Form IT-1099-R—Distributions from Pensions, Annuities, Retirement or Profit-sharing Plans, IRAs, Insurance Contracts, etc.

Form IT-112.1—New York State Resident Credit Against Separate Tax on Lump-Sum Distributions

Form IT-112-C—New York State Resident Credit for Taxes Paid to a Province of Canada

Form IT-112-R—New York State Resident Credit

Form IT-113-X*—Claim for Credit of Refund of Personal Income Tax

Form IT-135*—Sales and Use Tax Report for Purchases of Items and Services Costing \$25,000 or More

Form IT-182—Passive Activity Loss Limitations for Nonresidents and Part-Year Residents

Form IT-150—Resident Income Tax Return

Form IT-150-X—Amended Resident Income Tax Return

Form IT-2—Wage and Tax Statement Summary

Form IT-201—Resident Income Tax Return

Form IT-201-ATT—Other Tax Credits and Taxes

Form IT-201-V—Payment Voucher for Income Tax Returns Filed Electronically

Form TR-579-IT—E-File Signature Authorization

Form TR-579-PT—E-File Signature Authorization for Form IT-204-LL

Form TR-800-PT—E-File Partnership Opt-out

Form IT-201-X—Amended Resident Income Tax Return

Form IT-203—Nonresident and Part-year Resident Income Tax Return

Form IT-203-A—Nonresident Business Allocation Schedule

Form IT-203-ATT—Other Tax Credits and Taxes

Form IT-203-B—Non-resident and Part-year Resident Income Allocation and College Tuition Itemized Deduction Worksheet

Form IT-203-C—Nonresident or Part-year Resident—Spouse's Certification

Form IT-203-X—Amended Nonresident and Part-year Resident Income Tax Return

Form IT-204-LL—Limited Liability Company/Limited Liability Partnership Filing Fee Payment Form

Form IT-209—Claim for Noncustodial Parent Earned Income Credit

Form IT-2105—Estimated Income Tax Payment Vouchers

Form IT-2105.9—Underpayment of Estimated Income Tax by Individuals and Fiduciaries

Form IT-212—Investment Credit

Form IT-212-ATT*—Claim for Historic Barn Rehabilitation Credit and Employment Incentive Credit

Form IT-213—Claim for Empire State Child Credit

Form IT-213-ATT—Child Information for Empire State Child Credit

Form IT-214—Claim for Real Property Tax Credit for Homeowners and Renters

Form IT-215—Claim for Earned Income Credit

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ULTRATAX CS — NEW YORK, CONT.

Form IT-216—Claim for Child and Dependent Care Credit	Form IT-280—Nonobligated Spouse Allocation
Form IT-217—Claim for Farmers' School Tax Credit	Form IT-285—Request for Innocent Spouse Relief
Form IT-219—Credit for City of New York Unincorporated Business Tax	Form IT-360.1—Change of City Resident Status (Up to 3 Copies)
Form IT-220—Minimum Income Tax	Form IT-370—Application for Automatic Extension of Time to File for Individual
Form IT-221—Disability Income Exclusion	Form DTF-383—Income Tax Installment Payment Agreement Request
Form IT-230—Separate Tax on Lump-Sum Distributions	Form IT-59*—Tax Forgiveness For Victims of the September 11, 2001 Terrorist Attacks
Form IT-237*—Claim for Historic Homeownership Credit	Form IT-601—Claim for EZ Wage Tax Credit
Form IT-238*—Claim for Rehabilitation of Historic Properties Credit	Form IT-601.1—Claim for ZEA Wage Tax Credit
Form IT-239*—Claim for Handicapped Accessible Taxicabs and Livery Service Vehicles Credit	Form IT-602—Claim for EZ Capital Tax Credit
Form IT-241—Claim for Clean Heating Fuel Credit	Form IT-603—Claim for EZ Investment Tax Credit and EZ Employment Incentive Credit
Form IT-242*—Claim for Conservation Easement Tax Credit	Form IT-604—Claim for QEZE Credit for Real Property Taxes and QEZE Tax Reduction Credit
Form IT-243*—Claim for Biofuel Production Credit	Form IT-605—Claim for EZ Investment Tax Credit and EZ Employment Incentive Credit for the Financial Services Industry
Form IT-245—Claim for Volunteer Firefighters' and Ambulance Workers' Credit	Form IT-606—QEZE Credit for Real Property Taxes
Form IT-246*—Claim for Empire State Commercial Production Credit	Form IT-611*—Claim for Brownfield Redevelopment Tax Credit
Form IT-248*—Claim for Empire State Film Production Credit	Form IT-612*—Claim for Remediated Brownfield Credit for Real Property Taxes
Form IT-249—Claim For Long-Term Care Insurance Credit	Form IT-613*—Claim for Environmental Remediation Insurance Credit
Form IT-250*—Claim for Credit for Purchase of an Automated External Defibrillator	Form IT-631*—Claim for Security Officer Training Credit
Form IT-251*—Credit for Employment of Persons with Disabilities	Form TR-800-IT—Opt-Out Record for Tax Practitioners
Form IT-252*—Investment Tax Credit for the Financial Services Industry	Form IT-2104*—Employee's Withholding Allowance Certificate
Form IT-252-ATT*—Employment Incentive Credit for the Financial Services Industry	Form DTF-619*—QETC Facilities, Operations, and Training Credit
Form IT-253*—Alternative Fuels Credit	Form DTF-621*—Claim for QETC Employment Credit
Form IT-255*—Solar Electric Generating Equipment Credit	Form DTF-622*—Claim for QETC Capital Tax Credit
Form IT-256*—Claim for Special Additional Mortgage Recording Tax Credit	Form DTF-623*—Claim for Industrial or Manufacturing Business (IMB) Credit
Form IT-257*—Claim of Right Credit	Form DTF-624*—Claim for Low-Income Housing Credit
Form IT-258—Claim for Nursing Home Assessment Credit	Form DTF-626*—Low Income Housing Credit Recapture
Form IT-259*—Claim for Fuel Cell Electric Generating Equipment Credit	Form DTF-630*—Claim for Green Building Credit
Form IT-260—New York State and City of New York Surety Bond Form Change of Resident Status - Special Accruals	Form DTF-664*—Tax Shelter Disclosure for Material Advisors
Form IT-261—Change of Resident Status - Special Accruals	Form DTF-686*—Tax Shelter Reportable Transactions
Form IT-272—Claim for College Tuition Credit for New York State Residents	Form DTF-686-ATT*—New York Reportable Transactions Disclosure Statement and Request for a Determination
Form IT-398—New York State Depreciation Schedule for IRC Section 168(k) Property	Form POA-1—Power of Attorney
Form IT-399—New York State Depreciation Schedule	Form MTA-5 Estimated Metropolitan Commuter Transportation Mobility Tax Payment Voucher
	Form MTA-6 Metropolitan Commuter Transportation Mobility Tax Return

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ULTRATAX CS – NEW YORK, CONT.

New York City and Yonkers Forms

Form NYC-1127—Nonresident Employee of NYC
Hired on/after 1/4/73

Form NYC-114.5*—REAP Credit Applied to Unincorporated
Business Tax

Form NYC-114.6*—Claim for Credit Applied to Unincorporated
Business Tax

Form NYC-114.8*—Lower Manhattan Relocation Employment
Assistance Program (LMREAP) Credit Applied to Unincorporated
Business Tax

Form NYC-114.9*—Claim for Made in NYC Film Production Credit

Form NYC-202—Unincorporated Business Tax Return

Form NYC-202EZ—Unincorporated Business Tax Return
for Individuals (Short Form)

Form NYC-221—Underpayment of Estimated Unincorporated
Business Tax

Form NYC-399—Schedule of NYC Depreciation Adjustments

Form NYC-399Z—Depreciation Adjustments for Certain Post
9/10/01 Property

Form NYC-5UBTI—Declaration of Estimated Unincorporated
Business Tax

Form NYC-62—Automatic Extension—Unincorporated
Business Tax

Form Y-203—City of Yonkers Nonresident Earnings Tax Return

NEW YORK STATE CORPORATE

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

The UltraTax/1120 New York State corporate program allocates indirect liabilities and indirect deductions attributable to investment, subsidiary, and business capital.

New York State Forms

Form CT-222—Underpayment of Estimated Tax by a Corporation

Form CT-3—General Business Corporation Franchise Tax Return

Form CT-3-ATT—Schedules B, C, and D—Attachment to CT-3

Form CT-399—Depreciation Adjustment Schedule

Form CT-3M/4M—General Business Corporation MTA
Surcharge Return

Form CT-3-S—New York S Corporation Franchise Tax Return

Form CT-32—Banking Corporation Franchise Tax Return

Form CT-32-M—Banking Corporation MTA Surcharge Return

Form CT-32-S—New York Bank S Corporation Franchise
Tax Return

Form CT-34-SH—New York S Corporation Shareholders'
Information Schedule

Form CT-3-S-ATT—Attachment to CT-3-S

Form CT-400-MN—Estimated Tax for Corporations

Form CT-4—General Business Corporation Franchise Tax
Short Form

Form CT-5—Request for Six-Month Extension to File

Form CT-51—Combined Filer Statement for Newly Formed
Groups Only

Form CT-5.4—Request for Six-month Extension
to File S Corporation Franchise Tax Return

Form CT5.9—Request for Three-month Extension
to File (for Article 9 Tax Return)

Form CT-6—Election by a Federal S Corporation to be Treated
as a New York S Corporation

Form CT-5.1—Request for Additional Extension of Time to File

Form CT-3-A**—General Business Corporation Combined
Franchise Tax Return

Form CT-3-A/ATT**—Schedules A, B, and C—Attachment
to Form CT-3-A

Form CT-3-A/B**—Subsidiary Detail Spreadsheet

Form CT-3-A/C**—Report by a Corporation Included
in a Combined Franchise Tax Return

Form CT-5.3**—Request for Six-month Extension
to File Combined Return

Form CT-40*—Claim for Alternative Fuels Credit

Form CT-38—Minimum Tax Credit

Form CT-41*—Claim for Credit for Employment of Persons
with Disabilities

Form CT-43*—Claim for Special Additional Mortgage Recording
Tax Credit

Form CT-44*—Claim for Investment Tax Credit for the Financial
Services Industry

Form CT-46—Claim for Investment Tax Credit

Form CT-46-ATT*—Credit for Rehabilitation Expenses
for Enterprises and Historic Barns

Form CT-47*—Claim for Farmers' School Tax Credit

Form CT-183—Transportation and Transmission Corporation
Franchise Tax Return on Capital Stock

Form CT-183M—Transportation and Transmission Corporation
MTA Surcharge Return

Form CT-184—Transportation and Transmission Corporation
Franchise Tax Return on Gross Earnings

Form CT-184M—Transportation and Transmission Corporation
MTA Surcharge Return

Form CT-222.1*—Election to Use Different Annualization Periods
for Corporate Estimated Tax

Form CT-238*—Claims for Rehabilitation
of Historic Properties Credit

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ULTRATAX CS – NEW YORK, CONT.

Form CT-239*—Claim for Credit for Taxicabs and Livery Service Vehicles Accessible to Persons with Disabilities
Form CT-240*—Foreign Corporation License Fee Return
Form CT-241*—Claim for Clean Heating Fuel Credit
Form CT-242*—Claim for Conversation Easement Tax Credit
Form CT-243*—Claim for Biofuel Production Credit
Form CT-245*—Maintenance Fee & Activities Return for a Foreign Corporation Disclaiming Tax Liability
Form CT-246*—Claim for Empire State Commercial Production Credit
Form CT-248*—Claim for Empire State Film Production Credit
Form CT-249*—Claim for Long-Term Care Insurance Credit
Form CT-250*—Credit for Purchase of an Automated External Defibrillator
Form CT-259*—Claim for Fuel Cell Electric Generating Equipment Credit
Form CT-600—Ordering of Corporation Tax Credits
Form CT-601—Claim for EZ Wage Tax Credit
Form CT-601.1—Claim for ZEA Wage Tax Credit
Form CT-602—Claim for EZ Capital Tax Credit
Form CT-603—Claim for EZ Investment Tax Credit and EZ Employment Incentive Credit
Form CT-604—Claim for QEZE Tax Reduction Credit
Form CT-605—Claim for EZ Investment Tax Credit and EZ Employment Incentive Credit for the Financial Services Industry
Form CT-606—Claim for QEZE Credit for Real Property Taxes
Form CT-611*—Claim for Brownfield Redevelopment Tax Credit
Form CT-611.1*—Claim for Brownfield Redevelopment Credit
Form CT-612*—Claim for Remediated Brownfield Credit for Real Property Taxes
Form CT-613*—Claim for Environmental Remediation Insurance Credit
Form CT-631*—Claim for Security Officer Training Tax Credit
Form CT-3360*—Federal Changes to Corporate Taxable Income
Form DTF-350—Group Affidavit
Form DTF-619*—Claim for QETC Facilities, Operations, and Training Credit
Form DTF-621*—Claim for QETC Employment Credit
Form DTF-622*—Claim for QETC Capital Tax Credit
Form DTF-624*—Claim for Low-income Housing Credit
Form DTF-626*—Recapture of Low-income Housing Credit
Form DTF-630*—Claim for Green Building Credit
Form DTF-632*—Claim for Transportation Improvement Contribution Credit

Form DTF-686*—Tax Shelter Reportable Transactions
Form DTF-96*—Report of Address Change for Business Tax Accounts
Form IT-203-S—Group Return for Nonresident Shareholders of New York S Corporations (for Composite Filing)
Form IT-203-S-ATT—Attachment to Form IT-203-S
Form IT-370—Application for Automatic Extension of Time to File for Individuals
Form IT-2105-MN—Estimated Income Tax Payment Vouchers for Individuals
Form IT-2658—Report of Estimated Tax for Nonresident Individual Partners and Shareholders
Form IT-2658-ATT—Attachment to Report of Estimated Tax for Nonresident Individual Partners and Shareholders
Form IT-2659—Estimated Tax Penalties for Partnerships and New York S Corporations
Form IT-2658-E—Certificate of Exemption from Partnership or New York S Corporation Estimated Tax Paid on Behalf of Nonresident Individual Partners and Shareholders
Form CT-60-QSSS—Qualified Subchapter S Subsidiary Information Schedule
Form POA-1—Power of Attorney
Form TR-99—Application for Permission to File a Group Return
Form TR-579-CT—New York State E-filing Signature Authorization
Form TR 579.1-CT—New York State Authorization for Electronic Funds Withdrawal
Form TR-800-CT—Corporation Opt-out and Reasonable Cause Record

NEW YORK CITY CORPORATE

New York City Forms

Form NYC-222—Underpayment of Estimated Tax by Corporations
Form NYC-245*—Activities Report of Corporations
Form NYC-3L—General Corporation Tax Return
Form NYC-3360*—General Corporation Tax Report of Change in Tax Base Made by Internal Revenue Service and/or New York State Department of Taxation and Finance
Form NYC-399—Schedule of NYC Depreciation Adjustments
Form NYC-399Z—Depreciation Adjustment For Certain Post 9/10/01 Property
Form NYC-400—Declaration of Estimated Tax by General Corporations
Form NYC-EXT—Application for Automatic 6-month Extension of Time to File Business Income Tax Return
Form NYC-EXT.1*—Application for Additional Extension

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ULTRATAX CS — NEW YORK, CONT.

Form NYC-8 CB—Claim for Refund of General Corporation Tax from Carryback of Net Operation Loss

Form NYC-9.5*—Claim for REAP Credit Applied to General Corporation Tax and Banking Corporation Tax

Form NYC-9.6*—Claim for Credit Applied to General Corporation Tax

Form NYC-9.7*—UBT Paid Credit

Form NYC-9.8*—Claim for Lower Manhattan Relocation Employment Assistance Program (LMREAP) Credit Applied to General Corporation Tax and Banking Corporation Tax

Form NYC-9.9*—Claim for Made in NYC Film Production Credit

Form NYC-4S—General Corporation Tax Return (short form)

Form NYC-4S-EZ—General Corporation Tax Return (EZ Form)

Form NYC-3 A**—Combined General Corporation Tax Return

NEW YORK STATE PARTNERSHIP

The UltraTax/1065 New York State program:

- Allows for the special allocation of New York amounts to specific partners.
- Allows for the allocation of New York amount based on apportionment or separate books.
- Calculates Forms IT-398 and IT-399 depreciation for state purposes from amounts entered in the depreciation module.

New York State Forms

Form IT-203-GR—Group Return for Nonresident Partners

Form IT-203-GR-ATT-A—Schedule A-Nonresident Partners Qualifying and Participating in New York State Group Return

Form IT-203-GR-ATT-B—Schedule B-Nonresident Partners Qualifying and Participating in Yonkers Group Return

Form IT-204 —Partnership Return

Form IT-204.1—New York Corporate Partners' Schedule K

Form IT-204-ATT—Partner's Identifying Information

Form IT-204-IP—New York Partner's Schedule K-1

Form IT-204-CP—New York Corporate Partner's Schedule K-1

Form IT-204-LL—Limited Liability Company/Limited Liability Partnership Filing Fee Payment Form

Form IT-2105—Estimated Income Tax Payment Voucher for Individuals

Form IT-212—Investment Credit

Form IT-212-ATT*—Claim for Historic Barn Rehabilitation Credit and Employment Incentive Credit

Form IT-239*—Claim for Credit Taxicabs and Livery Service Vehicles Accessible to Persons with Disabilities

Form IT-241*—Claim for Clean Heating Fuel Credit

Form IT-242*—Claim for Conservation Easement Tax Credit

Form IT-243*—Claim for Biofuel Production Credit

Form IT-246*—Claim for Empire State Commercial Production Credit

Form IT-248*—Claim for Empire State Film Production Credit

Form IT-249*—Claim for Long-Term Care Insurance Credit

Form IT-250*—Claim for Credit for Purchase of an Automated External Defibrillator

Form IT-251*—Credit for Employment of Persons with Disabilities

Form IT-252*—Investment Tax Credit for the Financial Services Industry

Form IT-252-ATT*—Employment Incentive Credit for the Financial Services Industry

Form IT-253*—Claim for Alternative Fuels Credit

Form IT-256*—Claim for Special Additional Mortgage Recording Tax Credit

Form IT-259*—Claim for Fuel Cell Electric Generating Equipment Credit

Form IT-238*—Claim for Rehabilitation of Historic Properties Credit

Form IT-370—Application for Automatic Extension of Time to File for Individuals

Form IT-370-PF—Application for Automatic Six-Month Extension of Time to File for Partnerships and Fiduciaries

Form IT-398—New York State Depreciation Schedule for RC Section 168(k) Property

Form IT-399—New York State Depreciation Schedule

Form IT-601*—Claim for EZ Wage Tax Credit

Form IT-602*—Claim for EZ Capital Tax Credit

Form IT-603*—Claim for EZ Investment Tax Credit and EZ Employment Incentive Credit

Form IT-604*—Claim for QEZE Tax Reduction Credit

Form IT-605*—Claim for EZ Investment Tax Credit and EZ Employment Incentive Credit for the Financial Services Industry

Form IT-606*—Claim for QEZE Credit for Real Property Taxes

Form IT-611*—Claim for Brownfield Redevelopment Tax Credit

Form IT-612*—Claim for Remediated Brownfield Credit for Real Property Taxes

Form IT-613*—Claim for Environmental Remediation Insurance Credit

Form IT-631*—Claim for Security Officer Training Tax Credit

Form DTF-619*—Claim for QETC Facilities, Operations, and Training Credit

Form DTF-621*—Claim for QETC Employment Credit

Form DTF-622*—Claim for QETC Capital Tax Credit

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ULTRATAX CS — NEW YORK, CONT.

Form DTF-624*—Claim for Low-Income Housing Credit
Form DTF-626*—Recapture of Low-Income Housing Credit
Form DTF-630*—Claim for Green Building Credit
Form CT-2658-E—Certificate of Exemption from Partnership Estimated Tax Paid on Behalf of Corporate Partners
Form IT-2658-E—Certificate of Exemption from Partnership or New York S Corporation Estimated Tax Paid on Behalf of Nonresident Individual Partners and Shareholders
Form CT-2658/CT-2658-ATT—Report of Estimated Tax for Corporate Partners
Form IT-2658/IT-2658-ATT—Report of Estimated Tax for Nonresident Individual Partners and Shareholders
Form IT-2659—Estimated Tax Penalties for Partnerships and New York S Corporations
Form POA-1—Power of Attorney
Form TR-99—Application for Permission to File a Group Return
Form Y-204—Yonkers Nonresident Partner Allocation
Partner K-1 Worksheet—Partner’s Share of Modifications and Credits
Form DTF-350—Group Affidavit

NEW YORK CITY PARTNERSHIP

The UltraTax/1065 New York City program:

- Allows for the allocation of NYC Schedule B amounts to specific partners.
- Automatically calculates all Page 1 penalties and interest as well as Form NYC-221.
- Calculates estimates based upon options available to the preparer and prints Form NYC-5UB.
- Automatically calculates and limits the Business Tax Credit.
- Calculate Forms NYC-399 and NYC-399Z for depreciation adjustments from amounts entered in the depreciation module.

New York City Forms

Form NYC-113—Unincorporated Business Tax Claim for Credit or Refund
Form NYC-114.7*—UBT Paid Credit
Form NYC-115*—Unincorporated Business Tax Report of Change in Taxable Income
Form NYC-204—Unincorporated Business Tax Return
Form NYC-221—Underpayment of Estimated Unincorporated Business Tax
Form NYC-399—Schedule of NYC Depreciation Adjustments
Form NYC-399Z—Depreciation Adjustments For Certain Post 9/10/01 Property
Form NYC-5UB—Partnership Declaration of Estimated Unincorporated Business Tax

Form NYC-EXT—Application for Automatic 6-month Extension of Time to File Business Income Tax Return
Partner K-1 Worksheet—Partner’s Share of Modifications
Form NYC-204-EZ—Unincorporated Business Tax Return
NOL Worksheet—Net Operating Losses

NEW YORK 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.

The UltraTax/1041 New York program includes the New York State, New York City, and Yonkers Forms.

New York State and City Forms and Schedules

Form IT-205—Fiduciary Income Tax Return
Form IT-205-A—Fiduciary Allocation
Form IT-205-T—Allocation of Estimated Tax Payments to Beneficiaries
Form IT-112.1—New York State Resident Credit Against Separate Tax on Lump Sum Distributions
Form IT-112-C—New York State Resident Credit for Taxes Paid to a Province of Canada
Form IT-112-R—New York State Resident Credit
Form IT-182*—Passive Activity Loss Limitations
Form IT-2—Summary of W-2 Statements
Form IT-212*—Investment Credit
Form IT-220—Minimum Income Tax
Form IT-230—Separate Tax on Lump-Sum Distributions
Form IT-256*—Claim for Special Additional Mortgage Recording Tax Credit
Form IT-370-PF—Application for Automatic Six-Month Extension of Time to File for Partnerships and Fiduciaries
Form IT-398—New York State Depreciation Schedule for IRC Section 168(k) Property
Form IT-399—New York State Depreciation Schedule
Form IT-1099-R—Summary of Federal Form 1099-R Statements
Form IT-2105.9—Underpayment of Estimated Income Tax by Individuals and Fiduciaries
Form IT-2106-MN—Estimated Income Tax Payment Voucher for Fiduciaries
Form Y-206—Yonkers Nonresident Fiduciary Earnings Tax Return
POA-1—Power of Attorney
Schedule K-1 equivalent—Beneficiary’s Share of Income, Deductions, Adjustments, etc.
Grantor / Agency Report—Grantor’s Share of Income, Deductions, Adjustments, etc.

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ULTRATAX CS — NEW YORK, CONT.

TR-152*—Request for Copy of Filed Tax Return
DTF-280—Tax Information Authorization
Form TR-579-PT—New York State e-File Signature Authorization
Form TR-800—Partnership Opt-out and Reasonable Cause Record
Form DTF-686—Tax Shelter Reportable Transactions
Form DTF-686-ATT—New York Reportable Transaction Disclosure Statement and Request or a Determination

NEW YORK ESTATE

The UltraTax/706 New York Forms

Form ET-706—New York State Estate Tax Return
Form ET-14—Estate Tax Power of Attorney
Form ET-30*—Application for Release(s) of Estate Tax Lien
Form ET-95*—Claim for Refund of New York State Estate Tax
Form ET-117*—Release of Lien of Estate Tax
Form ET-130*—Tentative Payment of Estate Tax
Form ET-133—Application for Extension of Time to File and/or Pay Estate Tax
Form ET-141—New York State Estate Tax Domicile Affidavit
Form ET-415*—Application for Deferred Payment of Estate Tax

NEW YORK EXEMPT

With UltraTax/990 New York you can process both exempt organization and private foundation returns.

The UltraTax/990 New York Forms

Form CHAR500—Annual Filing for Charitable Organizations
Form CT-13—Unrelated Business Income Tax Return
Form CT-5—Request for Six-Month Extension to File
Form CT-5.1*—Request for Additional Extension of Time to File
Form CT-247—Application for Exemption from Corporation Franchise Taxes by a Not-for-Profit Organization
Form CT-400—Estimated Tax for Corporations
Form DTF-95*—Business Tax Account Update
Form DTF-96*—Report of Address Change for Business Tax Accounts
Form POA-1—Power of Attorney

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 New York 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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