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# ULTRATAX CS™

# NC

## NORTH CAROLINA STATE PRODUCTS

The UltraTax CS programs for North Carolina 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.

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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 North Carolina line-up for UltraTax CS includes the North Carolina 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.

## NORTH CAROLINA INDIVIDUAL

### North Carolina Forms and Schedules

Form D-400—North Carolina Individual Income Tax Return

Form D-400TC—Tax Credits

Form D-400V—North Carolina Payment Voucher

Form D-400X—Amended North Carolina Individual Income Tax Return

Form D-410—Application for Extension for Filing Individual Income Tax Return

Form D-422—Underpayment of Estimated Tax by Individuals

Form D-422A—Annualized Income Installment Worksheet

Form D-429—Worksheet for Determining the Credit for the Disabled Taxpayer, Dependent, and/or Spouse

Form NC-4\*—Employee's Withholding Allowance Certificate

Form NC-40—North Carolina Estimated Income Tax for Individuals

Form NC—North Carolina Tax Credit Summary

Form NC-478A—North Carolina Credit for Creating Jobs

Form NC-478B—North Carolina Credit for Investing in Machinery and Equipment

Form NC-478E—North Carolina Credit for Investing in Central Office or Aircraft Facility Property

Form NC-478G—North Carolina Credit for Investing

## STATE PRODUCT PROFILE

- North Carolina Individual
  - North Carolina Corporate (includes S Corp)
  - North Carolina Partnership
  - North Carolina Fiduciary
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in Renewable Energy Property

Form NC-478H—North Carolina Credit for Low Income Housing

Form NC-478I—North Carolina Credit for Research and Development

Form 478-Schedule—Pass-Through Schedule for NC-478 Series

Form Gen.58 —North Carolina Power of Attorney

Form NC-478J—Creating New Jobs Credit

Form NC-478K—Investing in Business Property

Form NC-478L—Investing in Real Property

Form NC-478V—Fee for Article 3A Credits

Form NC-478V-J—Fee for Article 3J Credits

Form NC-5500\*—Request to Wave Penalties

Form Article 3J Supplement—Qualifying Information for each establishment

Limited Liability Company Annual Report

## NORTH CAROLINA CORPORATE

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

### North Carolina Forms and Schedules

Form CD 401S—North Carolina S Corporation Franchise and Income Tax Return

Form CD 405—Corporation Franchise and Income Tax Return

Form CD-V—Corporate Income Corporate Tax Payment Voucher

Form CD-V—Franchise Tax Payment Voucher

Form CD-V Amended—Amended Franchise Tax Payment Voucher

Form CD-V Amended—Amended Income Tax Payment Voucher

Form CD 419—Application for Extension

Form CD 425—Corporate Tax Credit Summary

Form CD 429—North Carolina Corporate Estimated Tax Voucher

Form CD 429B—Underpayment of Estimated Tax by C Corporations

Form CD 479—North Carolina Annual Report

Form NC-NA (401S)—Nonresident Shareholder Agreement

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\*Denotes non-calculating form

\*\*Denotes 1120 Consolidated form

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## ULTRATAX CS — NORTH CAROLINA, CONT.

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Form 478 Schedule—Pass-through Schedule for NC-478 Series  
Form NC 478—Summary of Tax Credits Limited to 50% of Tax  
Form NC 478A—North Carolina Tax Credit for Creating New Jobs  
Form NC 478B—North Carolina Credit for Investing in Machinery and Equipment  
Form NC 478E—North Carolina Credit for Investing in Central Office or Aircraft Facility Property  
Form NC 478G—North Carolina Credit for Investing in Renewable Energy Property  
Form NC 478H—North Carolina Credit for Low Income Housing  
Form NC 478I—North Carolina Credit for Research and Development  
Form NC 478J—North Carolina Credit for Creating New Jobs  
Form NC 478K—North Carolina Credit for Investing in Business Property  
Form NC 478L—North Carolina Credit for Investing in Real Property  
Form NC 478V-J—North Carolina Fee for Article 3J Credits  
Form Article 3J—Qualifying Information for Each Establishment  
Form NC-478V—Fee for Article 3A Credits  
Form Gen. 58—Power of Attorney and Declaration of Representative  
Form NC K-1—Shareholder's Share of North Carolina Income, Adjustments and Credits  
Annual Report for Limited Liability Company  
Depreciation Adjustment Worksheet

### **NORTH CAROLINA PARTNERSHIP**

#### **The UltraTax/1065**

#### **North Carolina program:**

UltraTax/1065 North Carolina automatically calculates the tax due for participating nonresident partners and carries the amount to Form D-403 Page 1 and Schedule NC K-1

#### **North Carolina Forms and Schedules**

Form D-403—Partnership Income Tax Return  
Form D-403TC—Partnership Tax Credit Summary  
Form D-410P—Application for Extension  
Form NC-478V—Fee For Article 3A Credits  
Form NC-478V-J—Fee for Article 3J Credits  
Form NC-478—Summary of Tax Credits Limited to 50% of Tax  
Form NC-478 Schedule—Pass-Through Schedule for NC-478 Series  
Form NC-478A—Tax Credit Creating New Jobs  
Form NC-478B—Tax Credit Investing in Machinery and Equipment  
Form NC-478E—Tax Credit Investing in Central Office or Aircraft Facility Property

Form NC 478G—Tax Credit Investing in Renewable Energy Property  
Form NC-478H—Tax Credit Low Income Housing  
Form NC-478I—Tax Credit Research and Development  
Form NC-478J—Tax Credit Creating New Jobs  
Form NC-478K—Tax Credit Investing in Business Property  
Form NC-478L—Tax Credit Investing in Real Property  
Article 3J Qualifying Information  
Form NC-414\*—Income Tax Credit for Use of North Carolina Ports  
Form Gen-58—Power of Attorney and Declaration of Representative  
Form NC K-1—Partner's Share of N.C. Income, Adjustments and Credits.  
Form NC-NPA—Nonresident Partner Affirmation  
Limited Liability Company Annual Report  
Registered Limited Liability Partnership Annual Report  
Depreciation Adjustment Worksheet

### **NORTH CAROLINA 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.

#### **North Carolina Forms and Schedules**

Form D-407—Estates and Trusts Income Tax Return  
Form D-407TC—Estates and Trusts Tax Credit Summary  
Form D-410P—Application for Extension for Filing Partnership, Estate, or Trust Tax Return  
Form NC-478—Summary of Tax Credits Limited to 50% of Tax  
Form NC-478 Schedule—Pass-through Schedule for NC-478 Series  
Form NC-478V—Fee for Article 3A Credits  
Form NC K-1—Beneficiary's Share of N.C. Income, Adjustments, and Credits  
Form GEN-58—Power of Attorney and Declaration of Representative  
Grantor / Agency Report—Grantor's Share of N.C. Income, Adjustments, and Credits  
Depreciation Adjustments Worksheet

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\*Denotes non-calculating form

\*\*Denotes 1120 Consolidated form

## 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 North Carolina 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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