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# ULTRATAX CS™

# WI

## WISCONSIN STATE PRODUCTS

The UltraTax CS programs for Wisconsin 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 Wisconsin line-up for UltraTax CS includes Wisconsin 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.

## WISCONSIN INDIVIDUAL

### Wisconsin Forms and Schedules

Form A-771—Installment Agreement Request  
Form A-771a—Electronic Funds Transfer Authorization  
Form 1A—Wisconsin Income Tax Short Form  
Form WI-Z—Wisconsin Income Tax EZ Form  
Form 1—Wisconsin Income Tax  
Form 1-ES—Wisconsin Estimated Tax Voucher  
Form 1NPR and Questionnaire\*—Income Nonresident and Part-Year Resident and Legal Resident Questionnaire  
Form 1X—Wisconsin Income Tax Amended Return  
Form EPV—Wisconsin Electronic Payment Voucher  
Form A-222—Power of Attorney  
Form I-018a—Homestead Credit Notes and Attachments Checklist  
Form I-804—Claim for Decedent's Wisconsin Income Tax Refund  
Form W-RA—Required Attachments for Electronic Filing  
NOL Worksheets—Net Operating Loss and Carryforward Worksheets  
Schedule 2440W—Disability Income Exclusion  
Schedule DC\*—Development Zones Credit  
Schedule DI—Wisconsin Dairy and Livestock Farm Investment Credit

## STATE PRODUCT PROFILE

- Wisconsin Individual
- Wisconsin Corporate (includes S Corp)
- Wisconsin Partnership
- Wisconsin Fiduciary
- Wisconsin Property Tax

Schedules FC and Worksheet 1 and 2—Wisconsin Farmland Preservation Credit Claim

SPL-01\*—Model Form—Wisconsin Legislators

Schedule CR—Other Credits

Schedule EB\*—Ethanol and Biodiesel Fuel Pump Credit

Schedule FP\*—Film Production Credits

Schedule HI\*—Health Insurance Risk—Sharing Plan Assessments Credit

Schedule MI\*—Manufacturing Investment Credit

Schedule RT\*—Related Entity Expenses Disclosure Statement

Schedule H—Wisconsin Homestead Credit Claim and Rent Certificate (Supplement to Schedule H)

Schedule H-EZ—Wisconsin Homestead Credit EZ Version

Form I-014—Wisconsin Veterans and Surviving Spouses Property Tax Credit

Form I-018—Property Tax/Sale of Home Information (Supplement to Schedule H for e-filing)

Schedule I—Adjustment to Convert Federal AGI and Itemized Deductions

Schedule DM—Dairy Manufacturing Facility Investment Credit

Schedule EC\*—Enterprise Zone Jobs Credit

Schedule HR\*—Wisconsin Historic Rehabilitation Credits

Schedule IE\*—Wisconsin Internet Equipment Credit

Schedule MS—Manufacturer's Sales Tax Credit

Schedule MT—Wisconsin Alternative Minimum Tax

Schedule OS—Credit for Net Tax Paid to Another State

Schedule RS—Recycling Surcharge

Schedule T—Transitional Adjustments

Schedule TC\*—Wisconsin Technology Zone Credit

Schedule U—Underpayment of Estimated Tax by Individuals

Schedule VC—Wisconsin Venture Capital Credits

Schedule WD—Capital Gains and Losses

W-222\*—Statement of Minnesota Residency

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\*Denotes non-calculating form

\*\*Denotes 1120 Consolidated form

## WISCONSIN CORPORATE

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

### Wisconsin Forms and Schedules

Form 1CNS—Composite Wisconsin Individual Income Tax Return for Nonresident Tax-Option (S) Corporation Shareholders

Schedule MT\*—Wisconsin Alternative Minimum Tax

Form 4—Wisconsin Corporation Franchise or Income Tax Return

Form 4C\*—Separate Accounting Data

Form 4B—Wisconsin Apportionment Data

\*\*Combined Reports

Form 4B-1—Wisconsin Apportionment Data for Specialized Industries

Form 4BL—Wisconsin Net Business Loss Carryforward

Form 4-ES— Wisconsin Corporation Estimated Tax Voucher

Form 4H— Wisconsin Corporation Declaration of Inactivity

Form 4U—Underpayment of Estimated Tax by Corporations

Form 4-EPV—Wisconsin Corporation Electronic Payment Voucher

Form 5— Wisconsin Corporation Franchise or Income Tax Return

Form 5S— Wisconsin Tax-Option (S) Corporation Franchise or Income Tax Return

Form A-222—Power of Attorney

Form PW-2\*—Wisconsin Nonresident Partner, Member, Shareholder or Beneficiary Withholding Exemption Affidavit

Schedule DM\*—Dairy Manufacturing Facility Investment Credit

Schedule EC\*—Enterprise Zone Jobs Credit

Schedule IE\*—Wisconsin Internet Equipment Credit

Form PW-1—Wisconsin Nonresident Income or Franchise Tax Withholding on Pass-Through Entity Income

Schedule DC\*— Wisconsin Development Zones Credits

Schedule DI\*— Wisconsin Dairy and Livestock Farm Investment Credit

Schedule FC\*— Wisconsin Farmland Preservation Credit Claim

Schedule FT\*— Wisconsin Farmland Tax Relief Credit

Schedule HR\*— Wisconsin Historic Rehabilitation Credits

Schedule 5K-1—Tax-Option (S) Corporation Shareholder's Share of Income, Deductions, Credits, etc.

Schedule R\*— Wisconsin Research Credits

Schedule TC\*— Wisconsin Technology Zone Credit

Schedule V— Wisconsin Additions to Federal Income

Schedule VC\*— Wisconsin Venture Capital Credits

Schedule W—Wisconsin Subtractions from Federal Income

Schedule Y— Wisconsin Deductible Dividends

Schedule MS—Wisconsin Manufacturer's Sales Tax Credit Carry Forward

Schedule CR—Wisconsin Other Credits

Schedule CU-1\*—Wisconsin Credit Union Net Income

Schedule EB\*—Wisconsin Ethanol and Biodiesel Fuel Pump Credit

Schedule FP\*—Wisconsin Film Production Credits

Schedule HI\*—Wisconsin Health Insurance Risk-Sharing Plan Assessments Credit

Schedule MI\*—Wisconsin Manufacturing Investment Credit

Schedule R-1\*—Increased Wisconsin Research Credits for Activities Related to Internal Combustion Engines

Schedule R-2\*—Increased Wisconsin Research Credits for Activities Related to Certain Energy Efficient Products

Schedule RT—Wisconsin Related Entity Expenses Disclosure Statement

Schedule RT-1\*—Wisconsin Statement of Disallowed Related Entity Interest Expense or Rental Expense

## Wisconsin Partnership

### The UltraTax/1065 Wisconsin program:

- Allows for the allocation of Wisconsin Schedule 3K amounts to specific partners
- Automatically calculates the nonresidents' apportioned share of Schedule 3K-1 amounts
- Calculates and prints Schedule F and Forms 4835, 8825, 4684, and 8824, using Wisconsin amounts
- Automatically calculates Schedule D and Forms 4797 and 6252, using Wisconsin amounts
- Automatically calculates additional interest and underpayment for estimated surcharge on Form 3U and carries the amount to Form 3S
- Calculates estimated surcharge payments for succeeding year, when required
- Supports Wisconsin depreciation and amortization differences

### Wisconsin Forms and Schedules

Form 1CNP—Composite Wisconsin Individual Income Tax Return for Nonresident Partners

Form 3—Partnership Return

Form 3S—Partnership Recycling Surcharge

Form 3S-ES—Partnership Estimated Recycling Surcharge Voucher

Form 3U—Underpayment of Estimated Recycling Surcharge by Partnerships

Form 4B—Apportionment Data

Form 4B-1—Apportionment Data for Specialized Industries

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\*Denotes non-calculating form

\*\*Denotes 1120 Consolidated form

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## ULTRATAX CS – WISCONSIN, CONT.

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Form A-222—Power of Attorney  
Schedule 3K-1—Partner’s Share of Income, Deductions, Credits, etc.  
Form PW-1—Nonresident Income or Franchise Tax Withholding on Pass-Through Entity Income  
Form PW-2—Nonresident Partner, Member, Shareholder, or Beneficiary Withholding Exemption Affidavit  
Schedule DC\*—Wisconsin Development Zones Credits  
Schedule HR\*—Wisconsin Historic Rehabilitation Credits  
Schedule MT\*—Wisconsin Alternative Minimum Tax  
Schedule TC\*—Wisconsin Technology Zone Credit  
Schedule DI\*—Dairy and Livestock Investment Credit  
Schedule VC\*—Venture Capital Credit

### WISCONSIN 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.

#### Wisconsin Forms and Schedules

Form 2—Wisconsin fiduciary income tax for estates or trusts  
Form 1-ES—Estimated Income Tax Voucher  
Form A-222—Power of Attorney  
Form PW-1—Wisconsin Nonresident Income or Franchise Tax Withholding on Pass-Through Entity Income  
Form PW-2—Wisconsin Nonresident Partner, Member, Shareholder, or Beneficiary Withholding Exemption Affidavit  
Schedule 2K-1—Beneficiary’s Share of Income, Deductions, etc.  
Schedule 2K-1 Instructions\*—Beneficiary’s Instructions for Reporting Wisconsin Income, Deductions, etc. From Schedule 2K-1  
Schedule CC—Request for a Closing Certificate for Fiduciaries  
Schedule DI\*—Wisconsin Dairy and Livestock Farm Investment Credit  
Schedule FC—Farmland Preservation Credit  
Schedule MT—Wisconsin Alternative Minimum Tax  
Schedule TC\*—Wisconsin Technology Zone Credit  
Schedule U—Underpayment of Estimated Tax by Individuals and Fiduciaries

Schedule WD—Capital Gains and Losses  
2008 Form 1-ES—Wisconsin Extension Voucher  
Schedule CR—Other Credits  
Form PW-ES—Wisconsin Pass-through Entity Withholding Estimated Payment Voucher  
Grantor / Agency Report —Grantor’s Share of Income, Deductions, etc.  
Depreciation Disposal Worksheet  
Schedule RT—Related Entity Expenses Disclosure Statement

### WISCONSIN PROPERTY TAX

UltraTax Wisconsin Property Tax program supports 1040, 1041, 1065, 1120, and 1120S entities. It prepares local property tax returns from depreciation data entered in the asset tab.

#### Wisconsin Forms and Schedules

Form PA-003—Statement of Personal Property  
Form M-P—Manufacturing Personal Property Return

### 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 Wisconsin 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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\*\*Denotes 1120 Consolidated form

