

1040Works Conversions 2008



Welcome to 1040Works

Thank you for choosing 1040Works Professional Tax Software. We are excited to have you on our team and look forward to building a lasting relationship together.

As you make the transition to 1040Works, we want to ensure that everything runs as smoothly as possible. The first step of this transition will be converting your clients from ProSeries to 1040Works. This document contains step-by-step instructions on converting your clients. Please read through it carefully.

We have also included a section noting the specific fields for each form that is converted to each 1040Works system. The form information is lengthy and is intended for reference purposes only. You needn't read it in its entirety. Information is documented for systems: 1040, 1041, 1065, 1120, and 1120S.

If you require assistance during the conversion process, please don't hesitate to contact our support team at 1-800-843-1340. Again, welcome! We look forward to working with you.

Sincerely,

1040Works Professional Tax Software

Table of Contents

Welcome to 1040Works.....	2
Disclaimer Statement.....	4
Conversion Process.....	6
ProSeries to 1040Works, Individual Conversion Items.....	10
ProSeries to 1040Works, Fiduciary Conversion Items.....	23
ProSeries to 1040Works, Partnership Conversion Items.....	30
ProSeries to 1040Works, Corporate Conversion Items.....	37
ProSeries to 1040Works, S-Corporation Conversion Items.....	45

Disclaimer Statement

The goals of the 1040Works data conversion are as follows:

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1. To convert only the ProSeries data to the 1040Works format you will need to run Update Clients which transfers your 2008 1040Works data to 2009 1040Works.
2. To update only the 2008 ProSeries data to 2009 1040Works format that will allow you to generate complete and accurate Tax Organizers.

The data conversion is NOT intended to do the following:

1. It is NOT intended to convert all of your data.
2. It is NOT intended to allow you to generate a complete and accurate 2008 1040Works tax return.

NOTE: Do not process/prepare 2008 tax returns using only the converted information, as tax calculations may not be accurate. Some manual data entry may be required.

Asset Manager Conversions (All Systems)

- ✍ We recommend you print a copy of the 1040Works Federal Depreciation Schedule and verify that the 1040Works current depreciation amounts match those calculated by your prior software. Due to the many ways depreciation can be calculated, there may be slight differences that could require manual overrides in the 1040Works Asset Manager.
- ✍ If you have overridden any depreciation calculations, review them for accuracy.
- ✍ If you used 200% declining balance on any farm asset, you will need to override the current depreciation.
- ✍ If you had selected to delete the asset next year, the asset will not convert.
- ✍ Any asset carrying to Sch A points will be depreciated over the life of the asset using the Straight Line Method A.
- ✍ Assets involved in a like-kind exchange may not convert properly, because of the difference in handling between the two systems. Review them carefully to make sure the correct information is entered into the 1040Works Asset Manager.
- ✍ Due to the limited amount of information being converted, if you have current year Section 179, the conversion may calculate a carryforward of these amounts. To remove the unused carryforward, open the 1040Works 2008 Asset Manager, click the 179 button, and remove any unnecessary information.

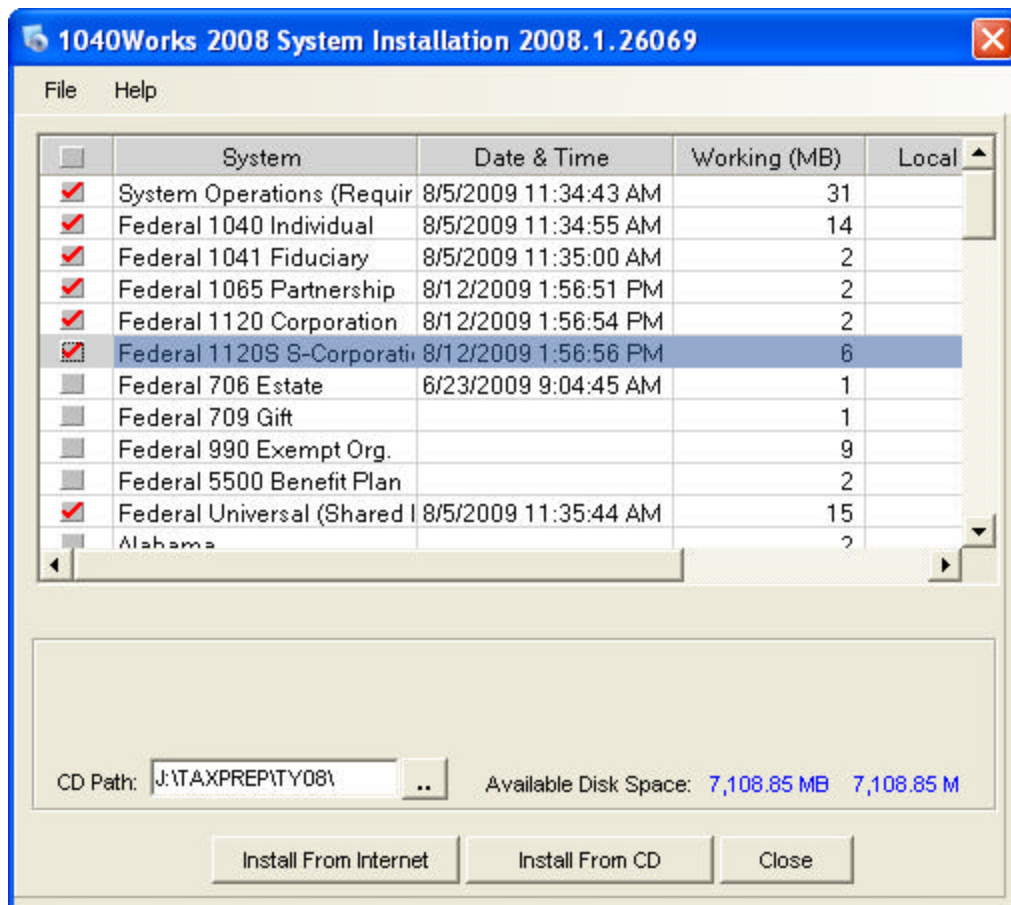
Individual Conversions

Note: *1040Works only converts information necessary to prepare a Proforma and Taxpayer Organizer.*

- ✍ Items selected for deletion for next year may not be taken into account. You may have to manually remove some items after updating to 1040Works 2009.
- ✍ Detail statements – All amounts and descriptions may not convert.
- ✍ 1040Works 2009 Taxpayer Organizer – Will be available August 2009.

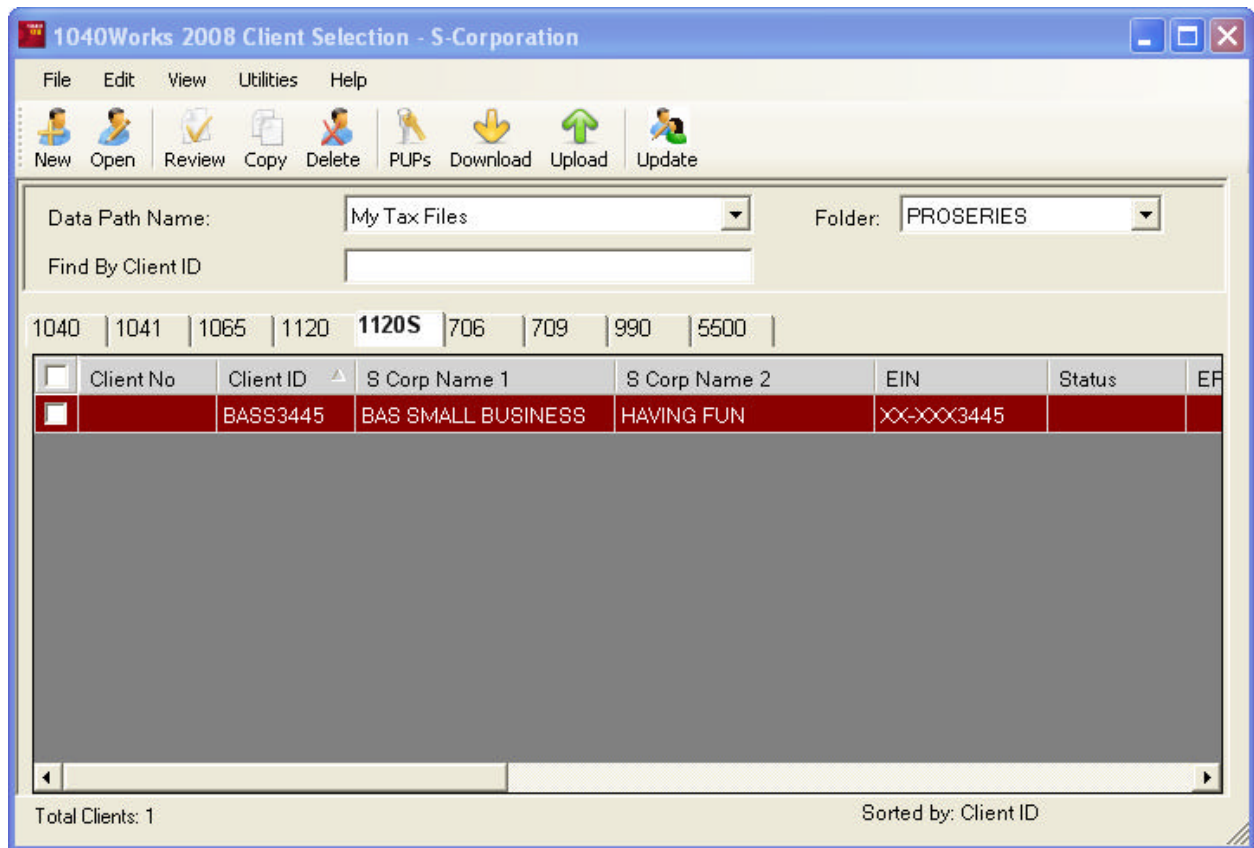
Conversion Process

1. As a precaution, backup your client data in your 2008 software package.
2. Install the 1040Works 2008 Demo (follow the installation instructions provided with the demo).
 - a. If you do not have a copy of the demo, call our Sales Team at (800) 230-2322.
 - b. After installation is complete, open the 1040Works 2008 Demo by clicking the *1040Works icon* located on your desktop.
3. If the Client Selection screen appears, click *Close*.
4. On the menu bar click *Installations*, and then *Upgrade Systems*.



5. Tag the following items using your mouse. Do this by clicking on the gray box to the left of the item:
 - a. System Operations
 - b. Federal Universal (Shared Forms) (is automatically tagged)

6. Tag only the Federal systems for clients you wish to convert:
 - a. Federal 1040 Individual
 - b. Federal 1041 Fiduciary
 - c. Federal 1065 Partnership
 - d. Federal 1120 Corporation
 - e. Federal 1120S S-Corporation
7. Click *Upgrade From Internet* (Upgrades may take up to 1 hour).
8. Once upgrade is complete, click *Close*.
9. Files that were upgraded will automatically decompress.
10. 1040Works 2008 will automatically open.
11. If the Client Selection screen appears, close it by clicking the *Red X*.



12. Click the *File* tab and click *Convert Clients*.
13. 1040Works will automatically close.
14. The 1040Works 2008 Conversion Utility will open.

15. Verify ProSeries Data Path:

C:\ProWin08\08Data

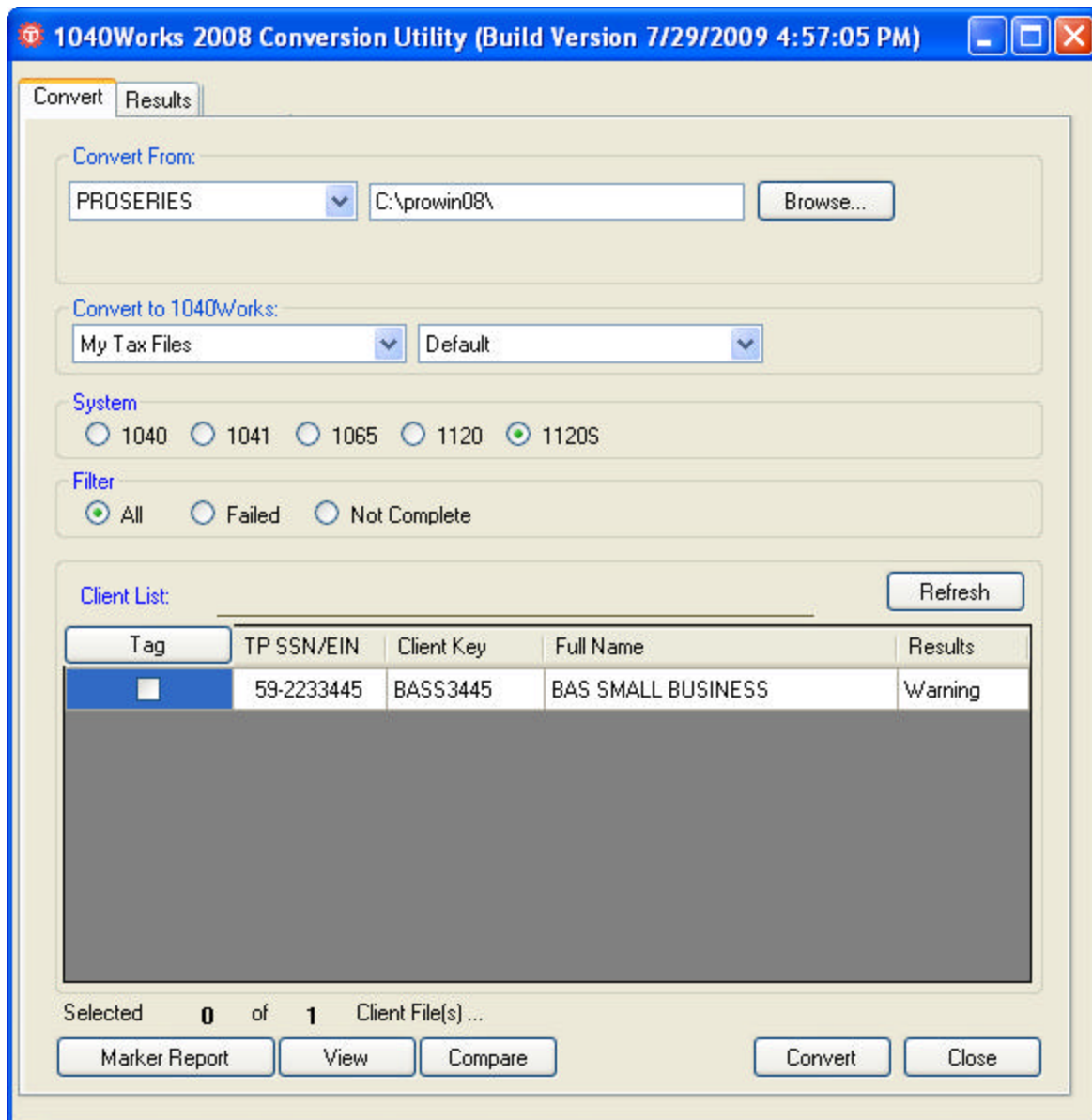
Note: Vendor Data Path will change with system selected at the bottom of the screen.

16. Select the 1040Works Data Path (default is MY TAX FILES).

17. Select the 1040Works Folder (default is DEFAULT).

18. Tag clients you want to convert. To Tag all clients click Tag.

19. Click *Convert*.



20. Once the conversion is complete, the status of each client will be displayed in the Status column.
21. To view a conversion report. Click the *Results* tab.
22. When finished click *Close*
23. 1040Works 2008 will automatically open
24. If the Client Selection window does not open automatically click the *Clients* button located on the button bar.
25. Carefully review your converted data files to be sure your converted data is accurate. To open the return double click on the desired client file; or, highlight the desired client and click *Open*. If you have items that did not convert, manually enter them in the 1040Works program.
26. If you have any questions or suggestions concerning the conversion process please contact us at support@1040Works.com or call (800) 843-1340.
27. Occasionally we will upgrade items in the conversion program. We will post upgrade changes on the web. You may reconvert clients affected by these changes.

CAUTION: *Entries made in 1040Works to previously converted clients will be lost.*

ProSeries® to 1040Works® 2008

Individual (1040) Conversion Items

The **bold titles** are the titles that correspond with the Forms Pane of the 1040Works tax program. The **underlined and bold** titles are the subtitles within each input screen.

GI – General Info - Advanced

General Information

Taxpayer First Name and Initial
Taxpayer Last Name
Title

Taxpayer Social Security Number

Taxpayer Occupation

Taxpayer Date of Birth

Taxpayer Blind

Taxpayer Permanent Disabled

Taxpayer Date of Death

Taxpayer Home Phone Daytime / Evening

Taxpayer Work Phone Daytime / Evening

Taxpayer Cell Phone Daytime / Evening

Taxpayer Fax Number

Taxpayer Pres Elect Campaign

Spouse First Name and Initial

Spouse Last Name

Title

Spouse Social Security Number

Spouse Occupation

Spouse Date of Birth

Spouse Blind

Spouse Permanent Disabled

Spouse Date of Death

Spouse Home Phone Daytime / Evening

Spouse Work Phone Daytime / Evening

Spouse Cell Phone Daytime / Evening

Spouse Fax Number

Spouse Pres Elect Campaign

Zip, City, State

Taxpayer E-mail Address

Spouse E-mail Address

Foreign Address

Foreign Street Address

City

State or Province

Postal Code

Country

Filing Status

Single

Taxpayer Can Be Claimed on Someone
Else's Return

Joint

Check if Spouse Is Claimed on Someone
Else's Return

Married Filing Separately

Dual Status Alien

Itemize

Claim Spousal Deduction

Didn't Live With Spouse All Year

Head of Household

Qualifying Widow(er)

Year Spouse Died

Preparer Third Party Designee

Address, County and School

Address

Apartment Number

DI Dependents

Dependent Information

First Name

Last Name

Birthdate

Social Security Number

Relationship

Months Lived at Home

Disabled

College Student

1 – 1040 Pg1

Form 1040 – U.S Individual Inc Tax Return Pg 1

Income

Household Emp Inc Not Reported on W-2
Taxable Grad Scholarship Amount
Taxable Refunds, Credits, or Offsets
Alimony Received – Taxpayer
Alimony Received – Spouse

Taxpayer – Recipients Amount
Spouse – Recipients SSN
Spouse – Recipients Amount
Student Loan Interest Deduction – Taxpayer/Spouse
Tuition and Fees Deduction – Taxpayer/Spouse
Domestic Production Activities Deduction
Other Adjustments
Jury Duty Pay
Personal Property Rental Expense
Reforestation
501(c) 18
Sub-Pay TRA
Other Adjustments

Adjustments

Educator Expenses – Taxpayer
Educator Expenses – Spouse
Self-Employed SEP, SIMPLE and Qualified Plans –Taxpayer/Spouse
Alimony Paid:
Taxpayer – Recipients SSN

2 – 1040 Pg2

Form 1040 – U.S. Individual Inc Tax Return, Pg2

Credits

Foreign Tax Credit
Mortgage Interest Credit
Adoption Credit
General Business Credits
Credit for Prior Year Minimum Tax
Qualified Electric Vehicle Credit
DC First-time Homebuyer Credit

Alternative Motor Vehicle Credit (Part I)
Alternative Fuel Vehicle Refueling Property Credit (Part II)

Other Taxes

Household Employment Tax
Recapture Tax for Investment Credit
Golden Parachute Payments

W2 – Wage W2

Form W-2 – Wages and Tax information

Ownership Code (T,S)
Employee SSN (if different)
Employee Name (if different)
Employee Address (if different)
Employee City, State, ZIP (if different)
Employer's ID Number
Foreign Address
Employer's Name
Employer's Address
Employer's ZIP, City, State
Wages, Tips, Other Compensation
Federal Income Tax Withheld
Social Security Wages
Social Security Tax Withheld
Medicare Wages and Tips
Medicare Tax Withheld
Social Security Tips

Allocated Tips
Advanced EIC Payment
Dependent Care Benefits
Nonqualified Plans
Box 12
Retirement Plan
Third-Party Sick Pay
Non-standard Indicator
Corrected Form W-2
State Name
State ID Number
State Wages
State Tax Withheld
Local Wages
Local Tax
Locality Name

W2G – Gambling W2

W-2G – Certain Gambling Winnings

Ownership Code (T,S)
Winner's Name (if different)

Winner's Street Address (if different)
Winner's City, State, Zip (if different)

Payer's Federal ID Number
Payer's Address
Payer's Zip, City, State
Gross Winnings
Federal Income Tax Withheld
Date Won
Transaction
Race
Winnings from Identical Wagers
Cashier

Window
First ID Number
Second ID Number
Payer's State ID Number
Locality Name
State Tax Withheld
Local Withholding
Non-Standard Indicator
Corrected Form W-2G

1099G – Govt Payments

Form 1099-G –Government Payments

Ownership Code (T,S)
Recipient's Name (if different)
Recipient's Street Address (if different)
Recipient's City, State, ZIP (if different)
Federal ID Number
Payer's Name
Payer's Address
Payer's ZIP, City, State
Payer's Telephone Number
Account Number
Unemployment Compensation

Amount Repaid
State/Local Income Tax Refunds, etc
Box 2 Amount is for Tax Year
Federal Income Tax Withheld
ATAA Payments
Taxable Grants
Agricultural Payments
1st State – State Tax Withheld
1st State – State
1st State – Payer State No

1099R – Pensions

1099R –Distributions from Pensions, Etc

Ownership Code (T,S)
Payee's Name (if different)
Payee's Street Address (if different)
Payee's ZIP, City, State (if different)
Federal ID Number
Foreign Address
Payer's Name
Payer's Address
Payer's ZIP, City, State
Account Number
Gross Distribution
Taxable Amount
Taxable Amount Not Determined
Total Distribution
Capital Gains Included in Line 2a
Federal Income Tax Withheld
Employee Contributions
Net Unrealized Appreciation
Distribution Code
IRA/ SEP/ SIMPLE

Other
Percent
Percent Total Distribution
Total Employee Contribution
Nonstandard Indicator
1st and 2nd State
1st and 2nd State Tax Withheld
1st and 2nd State Payer State Number
1st and 2nd State Local Tax Withheld
1st and 2nd State Locality Name
Local Distribution

Taxable Pension Calculation Using the Simplified Method

Cost in Plan at Starting Date
Age at Starting Date
Amount Received Tax Free after 1986
Annuity Starting Date
No of Months Payments Made'

RET – Ret Contrib

Retirement Contributions

Traditional IRA

Taxpayer –

IRA Contribution

Total Basis for 2007 and Earlier Years
Spouse –
IRA Contribution
Total Basis for 2007 and Earlier Years

Taxpayer –
Amount Actually Contributed for 2008
Spouse –
Amount Actually Contributed for 2008

Roth IRA

SSA – Soc Sec Ben

Social Security and Tier 1 Railroad Benefits

Taxpayer – Total Social Security Benefits
Taxpayer – Total Medicare Premiums Pd
Taxpayer – Medicare Prescription Drug
Premiums Paid
Taxpayer – Total Tier 1 Railroad Benefits
Taxpayer – Federal Income Tax Withheld

Spouse - Total Social Security Benefits
Spouse - Total Medicare Premiums Pd
Spouse – Medicare Prescription Drug Premiums
Paid
Spouse - Total Tier 1 Railroad Benefits
Spouse – Federal Income Tax Withheld

A - Schedule A

Schedule A – Itemized Deductions

Medicine and Drugs
Medical Insurance
Medical Miles
Long-term Care Premiums – Taxpayer Amount
Long-term Care Premiums – Spouse Amount
Long-term Care Premiums – Dependent Amount
Other Medical Expenses
State and Local Income Taxes
General Sales Taxes
Real Estate Taxes
Personal Property Taxes
Other Taxes
Home Mortgage Interest and Points
Reported on 1098
Mortgage Interest Not Reported on 1098
Home Mortgage Above Subject to AMT
Points Not Reported on 1098

Qualified Mortgage Insurance Premiums
Investment Interest
Contributions by Cash or Check
Gifts to Charity
Qualified Midwestern Disaster Contributions
Contributions Other than Cash or Check
Total Charitable Contributions
Casualty Losses
Union and Professional Dues
Other Un-reimbursed Expenses
Tax Return Preparation Fees
Investment Expense
Safe Deposit Box
Other Limited Expenses
Gambling Losses
Other Miscellaneous Deductions

B – Schedule B

Schedule B – Interest and Ordinary Dividends

Part I – Interest Income

Interest Income Description
Interest Income (Not US Govt)
Early Withdrawal
US Govt Savings Bonds
Tax-exempt (Muni Bonds)
Post 8-7-86 Priv Act Incl

Amount

Part II – Ordinary Dividends

Dividend Income Description
Total Ordinary Dividends
Qualified Dividends
Total Capital Gains
Unrecap Sec 1250
Nondividend Distr
Foreign Account
Name of Country
Foreign Trust

Interest Income from Seller-Financed Mortgages

Name
Address
SSN
Federal ID Number

C – Schedule C

Schedule C – Profit or Loss from Business

Spouse's Schedule C
Principal Business Including Product
Principal Business Code
Business Name
Employer Identification Number
Street address (if different)
City, State, ZIP (if different)
Accounting Method –
(Cash, Accrual, Other, Specify)
Materially Participate' in Business this Year
First Schedule C Filed for this Business

Part I - Income

Gross Receipts or Sales
Statutory Employee
Returns and Allowances
Other Income

Part II - Expenses

Advertising
Car / Truck Expense
Commissions
Contract Labor
Depletion
Depreciation
Employee Benefit Program
Insurance
Mortgage
Other
Legal / Professional Services
Office Expense
Pension / Profit Sharing
Rent or Lease:
Vehicles, Machinery, Equip

Other Business Property
Repairs / Maintenance
Supplies
Taxes and Licenses
Travel
Meals and Entertainment (Limited 50%)
Meals and Entertainment (100% Deductible)
Utilities
Wages

Part III - Cost of Goods Sold

Methods Used
Default = Cost
Lower of Cost or Market
Other, Specify)
Beginning Inventory
Purchases
Less Cost of Personal Use Items
Cost of Labor (Not Paid to Self)
Materials and Supplies
Other Costs
Inventory at End of Year

Part IV – Information on Your Vehicle

Date Vehicle Was Placed in Service
Total Number of Miles Vehicle Was Used For
Available for Use During Off-Hours?
Another Vehicle Available for Personal Use?
Have Evidence to Support Deduction?
If Yes, Is The Evidence written?

Part V - Other Expenses

Other Expenses

D – Schedule D

Schedule D – Capital Gains and Losses

Short-Term & Long-Term Capital Gains and Losses

1099 Transactions Prop Desc
Number of Shares
T,S,J
Type
Acquired Date

Sold Date
Term
Sales Price
Cost or Basis
Federal Withholding

E – Schedule E Pg 1

Schedule E, Pg 1 - Rental Real Estate / Royalties

Property Kind
 Location
 Entity Ownership (T,S,J)
 Real Estate Professional
 Exempt from Limitation (i.e. Final Disposition)
 Percentage of Ownership (if not 100%)
 Percent of Personal Use
 Rents Received
 Royalties Received
 Advertising
 Auto Expense
 Other Travel Expense
 Cleaning and Maintenance
 Commissions

Insurance
 Legal and Other Professional Fees
 Management Fees
 Mortgage Interest Paid to Banks Etc
 Other Interest
 Repairs
 Supplies
 Taxes
 Utilities
 Other
 Amortization
 Depreciation Expense – Form 4562
 Depreciation Expense – Depletion

ES – Estimates

1040 Estimated Tax

2008 Estimated Tax Payments

Prior Year Overpayment Applied
 1st Quarter Payment Date
 2nd Quarter Payment Date
 3rd Quarter Payment Date
 4th Quarter Payment Date
 1st Quarter Payment Amount

2nd Quarter Payment Amount
 3rd Quarter Payment Amount
 4th Quarter Payment Amount
 Extra Payment Amount
 Amount Paid with 2008 Extension

F - Schedule F

Schedule F Farm Income and Expense

Spouse's Schedule F
 Principal Product
 Agricultural Activity Code
 Employer ID Number
 Taxpayer Materially Participates

Other Income

Part I - Farm Income – Cash Method

Sale – Livestock and Other Items Bought for Resale
 Cost – Livestock, Otr Items Reported on Ln 1
 Sale of Livestock and Other Products Raised
 Total Cooperative Distributions Amount
 Taxable Amount
 Agricultural Program Payments
 Taxable Amount
 Commodity Credit Corporation (CCC) Loans:
 CCC Loans Reported Under Election
 CCC Loans Forfeited
 Taxable Amount
 Amount Received in 2008
 Crop Insurance Proceeds and Payments:
 Amount Received in Current Year
 Taxable Amount
 Elect to Defer to 2009
 Amount deferred from 2007
 Custom Hire (Machine Work) Income

Part II - Farm Expense – Cash Method and Accrual Method

Car / Truck Expenses
 Chemicals
 Conservation Expense
 Custom Hire
 Employee Benefit Programs
 Feed Purchased
 Fertilizers and Lime
 Freight and Trucking
 Gasoline Fuel and Oil
 Insurance (Not Health)
 Interest:
 Mortgage Pd to Banks, Etc
 Other
 Labor Hired Less Emp Credits
 Pension and Profit Share
 Rent or Lease:
 Machinery and Equipment
 Other (Land, Animals)
 Repairs and Maintenance
 Seeds and Plants
 Storage / Warehousing
 Supplies Purchased

Taxes
Utilities
Vet, Breeding, Medicine
Other Expenses

CCC Loans Reported Under Election
CCC Loans Forfeited
Taxable Amount
Crop Insurance Proceeds
Custom Hire (Machine Work) Income
Other Income Including Federal and State
Fuel Tax Credit
Inventory – Livestock, etc at Beginning of
Year
Cost of Livestock, Produce, etc During Year
Inventory of Livestock, etc at End of Year

Part III - Farm Income - Accrual Method

Unit-Livestock or Farm Price Method Used
Sale of Livestock, Produce, Grains, Etc
Total Coop Distributions (1099-PATR)
Taxable Amount
Agricultural Program Payments
Taxable Amount
Commodity Credit Corporation (CCC) Loans:

PTK1– PT K1 Recd

Partnership Schedule K-1 Received

Entity Ownership (T,S,J)
Partnership Identification Number
Partnership Name
Publicly Traded Partnership
General Partner or LLC Member
Limited Partner or LLC Member
Real Estate Professional
Materially Participated in Trade or Business
Active Rental Real Estate
Foreign Partnership
Final Disposition

Royalty Income
Net Short-term Capital Gain (Loss)
Net Long-term Capital Gain (Loss)
Collectibles (28% Rate) Gain (Loss)
Unrecaptured Section 1250 Gain
Net Section 1231 Gain (Loss): From Other
Rental Activities
Other Income or (Loss)

Section 179 Expense

Section 179 Expense Deduction

Other Deductions

Alternative Minimum Tax (AMT) Items

Tax – Exempt Income and Nondeductible Expenses

Other Information

Income or Loss

Ordinary Business Income or (Loss)
Net Rental Real Estate Income or (Loss)
Other Net Rental Income or (Loss)
Guaranteed Payments to Partner
Interest Income
Ordinary Dividends

CSK1 – CS K1 Recd

S Corporation Schedule K-1 Received

Entity Ownership (T,S,J)
S Corporation Identification Number
S Corporation Name
Real Estate Professional
Materially Participated in Trade or Business
Active Rental Real Estate
Final Disposition

Royalty Income
Net Short-term Capital Gain (Loss)
Net Long-term Capital Gain (Loss)
Collectibles (28% Rate) Gain or (Loss)
Unrecaptured Section 1250 Gain
Net Section Section 1231 Gain (Loss): From
Other Rental Activities
Other Income or (Loss)

Section 179 Expense

Section 179 Expense Deduction

Other Deductions

Credit and Credit Recapture

Alternative Minimum Tax (AMT) Items

Income or Loss

Ordinary Business Income or (Loss)
Net Rental Real Estate Income or (Loss)
Other Net Rental Income or (Loss)
Guaranteed Payments to Partner
Interest Income
Ordinary Dividends
Qualified Dividends

Items Affecting Shareholder Basis

Other Information

FDK1– FD K1 Recd

Fiduciary Schedule K-1 Received

Beneficiary Ownership Code
Estates or Trusts Identification Number
Estates or Trusts Name
Real Estate Professional
Materially Participated in Trade or Business
Active Rental Real Estate
Foreign Entity
Final Disposition

Net Long-term Capital Gain (Loss)
28% Rate) Gain (Loss)
Unrecaptured Section 1250 Gain
Other Portfolio Income
Ordinary Business Income
Net Rental Real Estate Income
Other Rental Income
Directly Apportioned Deductions
Estate Tax Deduction
Final Year Deductions
Alternative Minimum Tax Items
Credits and Credit Recapture
Other Information

Income or Loss

Interest Income
Ordinary Dividends
Qualified Dividends
Net Short-term Capital Gain (Loss)

SE – Schedule SE

Social Security Self-Employment Tax

Section B - Long Schedule SE

Taxpayer –
Filed Form 4029

Spouse –
Filed Form 4029

1116 – Form 1116

Form 1116 – Foreign Tax Credit

All data must be verified

Part I – Taxable Income from Foreign Sources

Name of Foreign Country or US Possession
Gross income from sources within country
Total Compensation is \$250,000 or More
Expenses Definitely Related to Line 1a
Income
Itemized or Standard Deduction
Other Deductions
Gross Income from All Sources
Home Mortgage Interest
Other Interest Expense
Losses from Foreign Sources

Taxes Withheld at Source On:

Dividends
Rents and Royalties
Interest
Other Foreign Taxes Paid

Foreign Taxes Paid in U.S. Dollars

Dividends
Rents and Royalties
Interest
Other Foreign Taxes Paid
AMT Total Foreign Taxes Paid

Part II– Foreign Taxes Paid or Accrued

Credit is Claimed for Taxes Accrued

2106 – Form 2106

2106 / 2106 EZ – Employee Business Expense

Occupation
Spouse
Force Long Form 2106

Part 1 – Employee Business Expenses

Step 1 Expenses

Parking Fees, Tolls
Travel Expense Away From Home – Other
Business Expenses Not Included Above (Not
Meals & Entertainment)
Meals & Entertainment Expenses

**Step 2 Reimbursements from Employer for
Expenses in Step 1**

Amounts Employer Paid That Were Not
Reported On Form W2, Box 12 – Not
Meals and Entertainment
Amounts Paid That Were Not Reported On
Form W2, Box 12 – Meals and
Entertainment

**Step 3 Figure Expenses to Deduct on
Schedule A**

Armed Forces Reservist
Amount of Line 10 Allocated to Armed
Forces Reservist
Qualified Performing Artist
Amount of Line 10 Allocated to Qualified
Performing Artist
Disabled Employee
Amount of Line 10 Allocated to Disabled
Employee

Part II – Vehicle Expenses

Part II – Vehicle Expenses, Sections A-D
Vehicle Is Available for Personal, Off Duty
Use?
Is Another Vehicle Available for Personal
Use?
If Yes, Is the Evidence written?

2441 – Form 2441

2441 – Child Care Credit

**Part I – Persons or Organizations who Provided
the Care**

Name
Street Address
City State and ZIP Code
Phone Number

SSN
EIN
Amount Paid

2555 – Form 2555

Form 2555 – Foreign Earned Income

Foreign Address
Foreign City
Foreign State or Province
Foreign Postal Code
Foreign Country Code
Name of Employer
Employer Address – U S Address
Employer Address – ZIP, City, State
Employer Address – Foreign Address
Employer Address – Foreign City
Employer Address – City
Employer Address – State or Province
Employer Address – Postal Code
Employer Address – Country

Employer Is:

A Foreign Entity
A U S Company
Self
A Foreign Affiliate of U S Company
Other
Other – Specify

Last Year (After 1981) Form 2555 Was Filed
Type of Exclusion and Tax Year for Which It
Was Effective

Citizen of Which Country
Maintained Separate Home For Family Because
of Adverse Living Conditions – City and
Country
Number of Days Home Was Maintained
Tax Home Located During the Year
Date Home Was Established

**Part II – Taxpayers Qualifying Under Bona Fide
Residence Test**

Date Bona Fide Residence Began
Date Bona Fide Residence Ended
Kind of Living Quarters
Relationship of Family Member Living Abroad
With Taxpayer
Period of Time Family Member Lived Abroad
With Taxpayer
Statement Submitted to Foreign Country That
Taxpayer Is Not a Resident of That Country
Taxpayer Required to Pay Income Tax to
Foreign Country
If Present in U S or Its Possessions on Business
During Tax Year:
Date Entered US

Date Left US
Days In US
Income Earned
List Any Contractual Terms
Type of Visa
Did Visa Limit Stay In Foreign Country
Address of US Home Maintained While Living Abroad
Was US Home Rented
Name of Occupants
Relationship

Business Days in US
Income Earned

Part IV - All Taxpayers

Total Wages, Salaries, Bonuses, Commissions, Etc
Allowable Share of Income for Srvc's Performed –
In a Business
In a Partnership
Partnership Name, Address, Nature of Income
Noncash Income:
Home
Meals
Car
Other Properties or Facilities
Allowances / Reimbursements:
Cost of Living and Overseas Differential
Family
Education
Home Leave
Quarters
Any Other Purpose
Other Foreign Earned Income Amount
Total Excludable Meals and Lodging

Part III - Taxpayers Physical Presence Test

Physical Presence Test – From
Physical Presence Test – Through
Principal Country of Employment
Information Concerning Travel Abroad:
Name of Country
Date Arrived
Date Left
Days in Country

6252 - Form 6252

Form 6252 – Installment Sale Income

Description
Ownership (T,S,J)
Date Acquired
Date Sold
Property Was Sold to Related Party After May 14, 1980
Property Sold to Related Party was A Marketable Security

Portion Taxable as Ordinary Income
Total Unrecaptured Section 1250 Gain

Part III – Related Party Installment Sale Income

Related Party Name
Social Security Number (Converts to Address Ln)
Federal EIN (Converts to Address Ln)
Street Address ZIP Code – City, State, ZIP
Did Related Party Resell During Tax Year
Second Disposition More Than 2 Years After the First
Date of Disposition
First Disp Was Sale of Stock to Issuing Corp
Second Disp Was Involuntary Conversion
Second Disp Occurred After Death
Tax Avoidance Not Principal Purpose
Selling Price of Property Sold by Related Party
Contract Price for Year of First Sale
Total Payment Received by End of 2008 Tax Year
Portion of Ln 35 That Is Ordinary Income

Part I – Gross Profit and Contract Price

Selling Price
Mortgage Purchaser Assumes
Cost or Other Basis of Property Sold
Depreciation Allowed or Allowable
Commissions and Other Expenses
Income Recapture from Form 4797
If Main Home, Amount of Excluded Gain

Part II – Installment Sale Income

Federal Gross Profit Ratio
Total Payments Received During Year
Current Interest Payments Received
Payments Received in Prior Years

8283 –Form 8283

Form 8283 –Noncash Charitable Contributions

Part I Information on Donated Property

Name of Donee Organization
Street Address of Donee Organization

ZIP Code (C,S,Z)
Description of Donated Property

Date of Contribution
Date Acquired by Donor (Dates Entered as
Various Will Not Convert)
How Acquired by Donor

Donor Cost or Basis
Fair Market Value
Method Used to Determine FMV

8379 Form 8379

Form 8379 – Injured Spouse Claim

Two-letter State Code If Main Home Was In A
Community Property State
Made and Reported Payments
Had Earned Income
Claimed Earned Income Credit
Claimed Refundable Tax Credit
Injured Spouse Is: Taxpayer
Injured Spouse Is: Spouse
Divorced or Separated from Spouse on Joint
Return and Want Refund Issues in This
Name Only
Current Street Address
Current ZIP Code
Current City

Current State

Part II – Items Allocated to Injured Spouse

Wages
Other Income Allocated to Injured Spouse
Adjustments to Income
Standard or Itemized Deductions
Number of Exemptions
Credits
Other Taxes
Federal Income Tax Withheld
Payments

8615 – Form 8615

Tax for Children Under Age 18 With Investment Income of More Than \$1,500

Parent's Name
Parent's Social Security Number
Parent's Filing Status Code
Portion of Child's Sch A Deduction
Parent's Taxable Income
Total Net Investment Income
Parent's Qualified Dividends

Amount From Parents' Sch D
If Sch D Filed, Lesser of Sch D, Ln 15 or 16
Line 18 (28% Rate)
Line 19 (Unrecaptured Sec 1250)
Form 4952 Line 4e
Form 4952 Line 4g

8814 – Form 8814

Form 8814 –Parents Election to Report Childs Interest and Dividends

Spouses Form 8814
Child's First Name
Child's Last Name
Child's Social Security Number
Child's Taxable Interest Income
Child's Accrued Interest Income Adj
Child's ABP Interest Income Adj
Child's OID Interest Income Adj
Child's Tax-Exempt Interest Income
Child's Ordinary Dividends

Child's Ordinary Dividends from Nominee
Distributions
Child's Alaska Permanent Fund Dividend
Child's Qualified Dividends
Child's Capital Gains Distributions
Child's Capital Gain Distributions form Nominee
Distributions
28% Rate Capital Gains
Unrecaptured Section 1250 Capital Gains

8829 – Form 8829

Form 8829 – Business Use of Home

Carry to

Area Used Exclusively for Business
Total Area of Home

Part 1 Part of Your Home Used for Business

Total Hours Facility Used (Day Care)
Total Hours Available (if Started or Stopped
Day Care in 2008)

Qualified Mortgage Insurance Premium
Real Estate Taxes
Excess Mortgage Interest
Insurance
Rent
Repairs and Maintenance
Utilities
Other Expenses

Part II Allowable Deductions

Direct Expenses

Casualty Losses
Deductible Mortgage Interest
Qualified Mortgage Insurance Premium
Real Estate Taxes
Excess Mortgage Interest
Insurance
Rent
Repairs and Maintenance
Utilities
Other Expenses

Indirect Expenses

Casualty Losses
Deductible Mortgage Interest

Carryover of Operating Expenses from 2007
Excess Casualty Losses
Carryover of Excess Casualty Losses
Casualty Losses Included On Lns 14 and 32

Part III Depreciation of Home

Smaller of Home's Adjusted Basis
Value of Land Included on Line 36
Depreciation Percentage
Depreciation Allowable

8839 – Form 8839

Form 8839 – Qualified Adoption Expenses

Qualified Adoption Expenses

Child's Name – First & Last
Year of Birth
Born Before 1991 and Disabled
Special Needs Child
Foreign Child
Social Security Number
Qualifying Expenses

Part III Employer Provided Adoption Benefits

Maximum Exclusion
Prior Year Employer-Provided Adoption
Benefits
Total Employer-Provided Adoption Benefits
Received in 2008
Total Employer-provided Adoption Benefits
Received

Part II – Adoption Credit

Maximum Credit Per Child

8853 – Form 8853

**Form 8853 – Archer MSAs and Long-Term Care
Insurance Contracts**

Section A- Archer MSA

Part I – General Information

Taxpayer or Employer Made Contribution to Archer MSA for 2008
If Line 1a is Yes, Taxpayer Was Uninsured When MSA Was Established
Taxpayer's Health Plan Is for Self-Only
Taxpayer's Health Plan Is for Family
If Married, Did Spouse or Employer Make Contrib
If Line 2a is Yes, Spouse Was Uninsured
Spouse's Health Plan is for Self-only
Spouse's Health Plan is for Family

Part II – Archer MSA Contributions and Deductions

Taxpayer – Total Employer Contributions to Archer
Taxpayer – Archer MSA Contributions Made for 2008

Taxpayer – Compensation from Employer
Spouse – Total Employer Contributions to Archer
Spouse – Archer MSA Contributions Made for 2008
Spouse – Compensation from Employer

Part III – Archer MSA Distributions

Taxpayer – Total Archer MSA Distributions Received
Taxpayer – Unreimbursed Qualified Medical Expenses
Spouse – Total Archer MSA Distributions Received
Spouse – Unreimbursed Qualified Medical Expenses

Section B – Medicare Advantage Distributions

Taxpayer – Total Medicare Advantage Distributions Received in 2008
Spouse – Total Medicare Advantage Distributions Received in 2008

Depr – Depr Wkst

Description	AMT – Cost
Type	AMT – Current Sec 179
Date	AMT – Prior Sec 179
Fed – Cost	AMT – Cur Sp Allow
Fed – Current Sec 179	AMT – Land
Fed – Prior Sec 179	AMT – Basis
Fed – Curr Sp Allow	AMT – Method
Fed – Land	AMT - Period
Fed – Basis	AMT – Current Deprec
Fed – Method	AMT – Prior Deprec
Fed – Period	AMT – Override Current
Fed – Current Deprec	Business Use Percent
Fed – Prior Deprec	Section 179 Property
Fed – Override Current	

ProSeries® to 1040Works® 2008

Fiduciary (1041) Conversion Items

The **bold titles** are the titles that correspond with the Forms Pane of the 1040Works tax program. The **underlined and bold** titles are the subtitles within the input screen

GI - General Information

1041 General Information

Name of Estate or Trust	Chapter
Name and Title of Fiduciary	Chapter 11
Street Address	Pooled Income
Zip, City, State	Number of K-1's Attached
Fiduciary Phone No	Employer ID Number
E-mail Address	Date Entity Created
Foreign Address	Section 4947(a)(1)
Foreign City	Not a Private Foundation
Foreign State	Section 4947(a)(2)
Foreign Postal Code	Initial Return
Fiscal/Short-Year Beginning	Final Return
Fiscal/Short-Year Ending	Amended Return
Type of Entity:	Change in Trust Name
Decedent	Change in Fiduciary Name
Simple	Change in Fiduciary Address
Complex	Estate or Filing Trust Made Section 645 Election
Disability	Fiduciary EIN
ESBT	IRS Can Discuss Return with Preparer
Grantor	

1 –1041 Pg1

Form 1040 – Tax Return for Estates and Trusts

Interest Income Grid

Interest Income Description	US Govt Bonds
Interest Inc (Not US Govt)	Total Muni Bonds
	Total Capital Gains
	Unrecap Sec 1250
	Sec 1202 Gains
	(28%) Collectibles

Dividend Income Grid

Dividend Income Description	US Govt Bonds
Total Ordinary	Total Muni Bonds
Qualified Dividends	Total Capital Gains
	Unrecap Sec 1250
	Sec 1202 Gains
	(28%) Collectibles

2 - 1041 Pg2

Form 1041 – Tax Return for Estates and Trusts, Page 2

Schedule A – Charitable Deduction

Amounts Paid for Charitable Purposes	Pooled Income Fund Only
Tax-exempt Income Allocable to Charitable Contribution	
Capital Gains Allocated to Corpus	
Sec 1202 Exclusion Allocable to Capital Gains	

Schedule B – Income Distribution Deduction

Adjusted Total Income

Tax-Exempt Interest
Net Gain Shown on Sch D
Capital Gains Included in Current Year
Charitable Contributions
Accounting Income
Amount Required to Be Distributed
Other Amounts Required to Be Distributed

Schedule G – Tax Computation

Recapture Taxes Investment Credit
Low-Income Housing Credit
Household Employment Taxes

I – Schedule I

Schedule I – Alternative Minimum Tax

Adjusted Total Income or Loss
Interest
Taxes
Miscellaneous Itemized Deductions
Refund of State and Local Taxes
Depletion
Interest from Private Activity Bonds
Qualified Small Business Stock
Exercise on Incentive Stock Options
Other Estates and Trusts
Election Large Partnerships
Disposition of Property
Depreciation on Assets
Passive Activities

Other Information

Did Estate or Trust Receive Tax Exempt Income
Tax Exempt Interest Income and Dividends
Earnings by Contract or Similar Arrangement
Account in Foreign Country
Name in Foreign Country
Was Estate or Trust Grantor in Current Year
Receive Seller-Financed Mortgage Interest
Complex Trust Sec 663(b) Election
Section 643(e)(3) Election
Decedent's Estate Open More than 2 Years
Trust Beneficiaries Are Skip Persons

Loss Limitations
Circulation Costs
Long-term Contracts
Mining Costs
Research and Experimental Costs
Income from Certain Installment Sales
Intangible Drilling Costs Preference
Alternative Tax Net Operating Loss Deduction
Adjusted Tax-exempt Interest
Capital Gains for Charitable Purposes on Sch A,
line 4
Capital Gains for Charitable Purposes from
Current Year

A1 1041-A Pg1

Form 1041-A – Trust Accumulation of Charitable Amounts Information Return

Prepare Form 1041-A with Form 1041
Other Deductions
Accumulated Income Set Aside in Prior Tax
Years

Income Set Aside During Current Tax Year
Principal Distributed in Prior Tax Years

A2 – 1041-A, Pg 2

Form 1041-A – Accumulation of Charitable Amounts, Page 2

Part IV - Balance Sheet

Assets – Beg-of-Year

Cash Non-Interest Bearing
Savings and Temporary Cash Investments
Net Accounts Receivable
Receivables Due from Disqualified Persons
Net Other Notes and Loans Receivable
Inventories for Sale or Use
Prepaid Expenses and Deferred Charges

Investments - U.S. Govt and State
Obligations
Investments - Corporate Stock
Investments - Corporate Bonds
Net Investments - Land, Buildings
Investments – Other
Net Land, Buildings, And Equipment
Other Assets

Assets – End-of-Year

Cash Non-Interest Bearing
Savings and Temporary Cash Investments
Accounts Receivable
Less Allowance for Doubtful Accounts
Receivables Due from Disqualified Persons
Other Notes and Loans Receivable
Less Allowance for Doubtful Accounts
Inventories for Sale or Use
Prepaid Expenses and Deferred Charges
Investments - U.S. Govt and State
Obligations
Investments - Corporate Stock
Investments - Corporate Bonds
Investments – Land, Buildings
Less Accumulated Depreciation
Investments – Other
Land, Buildings, and Equipment Basis
Less: Accumulated Depreciation

Other Assets

Liabilities – Beg-of-Year

Accounts Payable and Accrued Expenses
Mortgages and Other Notes Payable
Other Liabilities

Liabilities – End-of-Year

Accounts Payable and Accrued Expenses
Mortgages and Other Notes Payable
Other Liabilities

Net Assets – Beg-of-Year

Trust Principal or Corpus
Undistributed Income

Net Assets – End-of-Year

Trust Principal or Corpus
Undistributed Income

K1 – Benef K 1

Schedule K-1 – Beneficiary’s Share

Beneficiary’s Name
Beneficiary’s Name (2nd Line)
Street Address
Zip Code (City, State, ZIP)
Social Security Number

Employer Identification Number
Percentage of Distribution
Amended K-1
Final K-1

PTK1 – PT K1 Recd

Partnership Schedule K-1 Received

Description

Partnership Identification Number
Partnership Name
Publicly Traded Partnership
Real Estate Professional
Active Rental Real Estate
Foreign Partnership
Final Disposition
Some Is Not at Risk

Net Short-term Capital Gain
Net Long-term Capital Gain
Collectibles (28% Rate) Gain
Unrecaptured Section 1250 Gain
Net Section 1231 Gain:
From Other Rental Activities
Other Income

Section 179 Expense Deduction

Other Deductions

Self-Employment Earnings

Net Earnings from Self-employment – Nonfarm
Gross Farming or Fishing Income
Gross Nonfarm Income

Credits and Credit Recapture

Alternative Minimum Tax (AMT) Items

Other Information

Income or Loss

Ordinary Income from Trade or Business
Net Income from Rental Real Estate Activities
Net Income from Other Rental Activities
Guaranteed Payments to Partner
Interest Income
Interest Income from U.S. Government
Obligations
Ordinary Dividends
Qualified Dividends
Royalty Income

CSK1 – CS K1 Recd

S Corporation Schedule K-1 Received

S Corporation Identification Number
S Corporation Name
Materially Participated
Real Estate Professional
Active Rental Real Estate
Final Disposition
Some Is Not at Risk

Royalties
Net Short-term Capital Gain
Net Long-term Capital Gain
Collectibles (28%) Rate Gain
Unrecaptured Section 1250 Gain:
 From Other Rental Activities
Other Income

Income or Loss

Ordinary Business Income
Net Rental Real Estate
Other Net Rental Income
Interest Income
Interest Income from U.S. Obligations
Ordinary Dividends
Qualified Dividends

Section 179 Deduction

Other Deductions

Credits and Credit Recapture

Alternative Minimum Tax (AMT) Items

Other Information

FDK1 – FD K1 Recd

Fiduciary Schedule K-1 Received

Estate's or Trust's Identification Number
Estate or Trusts Name
Real Estate Professional
Materially Participated in Trade or Business
 Activity
Active Rental Real Estate
Foreign Entity
Final Disposition

Net Short-term Capital Gain(Loss)
Net Long-term Capital Gain(Loss)
(28% Rate) Gain(Loss)
Unrecaptured Section 1250 Gain
Other Portfolio Income
Net Rental Real Estate Income
Other Rental Income
Directly Apportioned Deductions
Estate Tax Deductions
Final Year Deductions
Alternative Minimum Tax Items
Credits and Credit Recapture
Other Information

Income or Loss

Interest Income
Interest on US Government Obligations
Ordinary Dividends
Qualified Dividends

C - Schedule C

Schedule C - Profit or Loss from Business

Principal Business
Principal Business Code
Business Name
Employer Identification Number
Street Address (if Different)
City, State, and ZIP (if Different)
Accounting Method (Cash, Accrual, Other,
 Specify)
'Materially Participate' in Business
First Schedule C Filed for this Business

Returns and Allowances
Other Income (Inc Fuel Tax Credit or Refund)

Part II Expenses

Advertising
Car/Truck Expense
Commissions
Contract Labor
Depletion
Depreciation
Employee Benefit Program
Insurance
Interest:
 Mortgage

Part I Income

Gross Receipts or Sales
Statutory Employee

Other
Legal / Professional Services
Office Expense
Pension/Profit Sharing
Rent or Lease:
 Vehicles, Machinery, Equipment
 Other Business Property
Repairs / Maintenance
Supplies
Taxes and Licenses
Travel
Meals and Entertainment (Limited 50%)
Meals and Entertainment (100% Limits)
Utilities
Wages

Part III Cost of Goods Sold

Inventory Methods Used (Cost, Lower of Cost or Market, Other)
Was There Any Change in Determining Quantities?

D - Schedule D

Schedule D – Capital Gains and Losses

Details on Sales

1099 Transactions Prop Description
Acquired Date
Sold Date
Term

Beginning Inventory
Purchases
Cost of Labor (Not Paid to Self)
Materials and Supplies
Other Costs
Inventory at End of Year

Part IV Information on Your Vehicle

Date Vehicle Was Placed in Service
Business Miles from 01-01-08 – 06-30-08
Miles – Commuting
Miles – Other
Available for Use during Off-hours
Another Vehicle Available for Personal Use
Have Evidence to Support Deduction
If Yes, Is Evidence Written?

Part V Other Expenses

Other Expenses

E1 – Sch E, Pg 1

Schedule E. Pg 1 – Rental Real Estate/Royalties

Property Kind
Location
Exempt from Limitation (i.e. Final Disposition)
Real Estate Professional
Personal Use for 14 Days or 10%
Rents Received
Royalties Received

Current Year Expenses

Advertising
Other Travel Expense
Cleaning and Maintenance
Commissions

Insurance
Legal and Other Professional Fees
Management Fees
Mortgage Interest Paid to Banks
Other Interest
Repairs
Supplies
Taxes
Utilities
Other
Depreciation
Depletion

F - Schedule F

Schedule F Farm Income and Expense

Principal Product
Agricultural Activity Code
Employer ID Number

Taxpayer Materially Participates

Part I - Farm Income – Cash Method

Sale – Livestock and Other Items Bought for Resale
 Cost – Livestock, Other Items Reported on Ln 1
 Sale of Livestock and Other Products Raised
 Total Cooperative Distributions Amount
 Taxable Amount
 Agricultural Program Payments
 Taxable Amount
 Commodity Credit Corporation (CCC) Loans:
 CCC Loans Reported Under Election
 CCC Loans Forfeited
 Taxable Amount
 Crop Insurance Proceeds and Payments:
 Amount Received in 2008
 Taxable Amount
 Elect to Defer to 2009
 Amount deferred from 2007
 Custom Hire (Machine Work) Income
 Other Income

Part II - Farm Expense – Cash Method and Accrual Method

Car / Truck Expenses
 Chemicals
 Conservation Expense
 Custom Hire
 Employee Benefit Programs
 Feed Purchase
 Fertilizers and Lime
 Freight and Trucking
 Gasoline Fuel and Oil
 Insurance (Not Health)

ES – Estimates

1041 Estimated Tax

2008 Estimated Tax Payments

1st Quarter Payment Date
 1st Quarter Payment Amount
 2nd Quarter Payment Date
 2nd Quarter Payment Amount
 3rd Quarter Payment Date

Interest:
 Mortgage Pd to Banks, Etc
 Other
 Labor Hired Less Emp Credits
 Pension and Profit Share
 Rent or Lease:
 Machinery and Equipment
 Other (Land, Animals)
 Repairs and Maintenance
 Seeds and Plants
 Storage / Warehousing
 Supplies Purchased
 Taxes
 Utilities
 Vet, Breeding, Medicine
 Other Expenses

Part III - Farm Income - Accrual Method

Sale of Livestock, Produce, Grains, Etc
 Total Coop Distributions (1099-PATR)
 Taxable Amount
 Agricultural Program Payments
 Taxable Amount
 Commodity Credit Corporation (CCC) Loans:
 CCC Loans Reported Under Election
 CCC Loans Forfeited
 Taxable Amount
 Crop Insurance Proceeds
 Custom Hire (Machine Work) Income
 Inventory – Livestock, etc at Beginning of Year
 Cost of Livestock, Produce, etc During Year
 Inventory of Livestock, etc at End of Year

Form 1116 - Foreign Tax Credit

Form 1116 – Foreign Tax Credit

Type of Income (Converts to First Multiple Only)

Part I – Taxable Income from Foreign Sources

Name of Foreign Country
 Gross Income from Sources Within Country
 Line 1a Is Compensation for Personal Use
 (Converts to First Multiple Only)
 Expenses Definitely Related to Ln 1a Income
 Itemized or Standard Deduction

Other Deductions
 Home Mortgage Interest
 Other Interest Expense
 Losses from Foreign Sources

Part II – Foreign Taxes Paid or Accrued

Credit Is Claimed for Taxes Accrued
 Date Taxes Paid or Accrued

Taxes Withheld at Source On:

Dividends
Rents and Royalties
Interest
Other Foreign Taxes Paid

Foreign Taxes Paid in US Dollars:

Dividends
Rents and Royalties
Interest
Other Foreign Taxes Paid

4952 –Form 4952

Form 4952 – Investment Interest Exp Deduction

Investment Interest Expense Paid or Accrued in
2008
Disallowed Investment Interest Expense from
2007, Form 4952, Line 7
Gross Income from Property Held for Investment
Net Gain from Disposition of Property

Net Capital Gain from Disposition of Property
Net Capital Gain from Disposition of Property
Held for Investment
Amount of Lines 4b and 4e Elected To Include
In Investment Income
Investment Expenses

Depr – Depr Wkst

Description
Type
Date
Fed – Cost
Fed – Land
Fed – Basis
Fed – Method
Fed – Period
Fed – Current Deprec
Fed – Prior Deprec
Fed – Override Current

AMT – Cost
AMT – Cur Sp Allow
AMT – Land
AMT – Basis
AMT – Method
AMT - Period
AMT – Current Deprec
AMT – Prior Deprec
AMT – Override Current
Business Use Percent
Section 179 Property

ProSeries® to 1040Works® 2008

Partnership (1065) Conversion Items

The **bold titles** are the titles that correspond with the Forms Pane of the 1040Works tax program. The **underlined and bold** titles are the subtitles within the input screen.

GI - General Information

General Information

Name	Method of Accounting:
Second Name	Accrual
Address	Other
Zip Code	If Other, Specify
City	Number of K-1s Attached
State	
Fiscal/Short-Year – Beginning	
Fiscal/Short-Year – Ending	
Business Activity	
Product or Service	
Business Code	
EIN	
Date Business Started	
Initial Return:	
Final Return	
Technical Termination	
Name Change	
Address Change	
Amended Return	

Type of Partnership

Domestic Limited Partnership
Domestic Limited Liability Company
Domestic Limited Liability Partnership
Foreign Partnership
Other Type of Partnership: Specify

Contact Information

Partnership Number
Fax Number
E-mail Address
IRS May Discuss Return with Preparer

1 - 1065 Pg 1

Form 1065 – Partnership Return of Income Pg 1

Income

Gross Receipts or Sales	Rent
Returns and Allowances	Taxes:
Ordinary Income (Loss) From Other Partnerships and Fiduciaries	License
Net Farm Profit (Loss)	Payroll
Net Gain (Loss)	Real Estate
Other Income or (Loss)	State Income
Total Income	Other

Deductions

Salaries and Wages (Other Than Partners)	Interest
Employment Credits	Depreciation
Guaranteed Payments to Partners	Less: Depreciation on Sch A and Elsewhere
Amount of Line 10 Paid for Medical Insurance	Depletion (Not Oil & Gas)
Repairs & Maintenance	Retirement Plans
Bad Debts	Employee benefit Programs
	Other Deductions:
	Other Business Deductions

2 - 1065 Pg 2

Form 1065 – Partnership Return of Income Pg 2

Schedule A – Cost of Goods Sold

Inventory at Beginning of Year
Purchases
Cost of Labor
Additional Section 263A Costs
Other Costs
Inventory at End of Year
Inventory Method"
 Lower of Cost or Market
 Other
 Specify
Writedown of 'Subnormal' Goods
LIFO Inventory Method Adopted
Do Rules of Section 263A Apply to Partnership?
Any Changes in Inventory Valuation

Schedule B – Other Information

Is This a Domestic Limited Liability Company?
Is This a Domestic Limited Liability Partnership?
Is This a Foreign Partnership?
Other: Specify
Was Any Partner in Partnership a Disregarded Entity?
Did Any Foreign or Domestic Corp, etc Own an Interest of 50% or More of the Partnership?
Did Any Individual or Estate Own an Interest of 50% or More of the Partnership?
Own Directly 20% or More of the Total Voting Power of Any Foreign or Domestic Corp?

3 – 1065 Pg 3

Form 1065 – Partnership Return of Income, Pg 3

Own Directly an Interest of 20% or More in Beneficial Interest of a Trust
Did Partnership File Form 8893?
Does Partnership Meet Question 6 Requirements?
Print Schs L, M-1, and M-2
Partnership is a Publicly Traded Partnership?
Partnership Have Any Debt That Was Cancelled, Forgiven or Reduced?
Has Partnership Filed, or Is Required to File, Form 8918?
Did Partnership Have Foreign Financial Account?
If Yes, Name of Country
Was Partnership Grantor of A Foreign Trust?
Was Partnership Making or Has Made section 754 Election?
Partnership Make Option adjustment Under Section 743(b) or 734(b) With Built-In Loss?

Is Partnership Required To Adjust Basis of Partnership Assets?
Partnership Distributed Like-Kind Exchange
Did the Partnership Distribute A Tenancy-In-Common?
If Partnership Is Required to File Form 8858
 Enter the Number of Forms 8858 Attached
Does Partnership Have Any Foreign Partners? If Yes Enter Number of Forms 8805
Enter Number of Forms 8865 Attached To This Return

Tax Matters Partner

Name
Address
ZIP Code
SSN
EIN

4 - 1065 Pg 4

Form 1065 – Partnership Return of Income

Sch K – Partners' Shares of Income, Credits, Etc

Net Rental Real Estate Income
Gross Income From Other Rental Activities
Less Expenses
Guaranteed Payments
Interest Inc – (Not US Govt)
Dividends – Total Ordinary
Dividends – Qualified Dividends
Royalties
Net Short-Term Capital Gain
Net Long-Term Capital Gain

Collectibles 28% Gain
Unrecaptured Section 1250 Gain

Deductions

Section 179 Deduction
Investment Interest Expense
Section 59(e)(2) Expenditures
Section 59(e)(2) Expenditures – Type
Amounts Paid for Medical Insurance
Domestic Production Activities (QPAI Link)

Qualified Production Activities
Employee's W-2 Wages

Nonconventional Source Fuel Credit
Alternative Motor Vehicle Credit

Self-Employment

Ordinary Income
Gross Farming or Fishing Income
Gross Non-Farm Income

Alternative Minimum Tax (AMT) Items

Post-1986 Depreciation Adjustment
Adjusted Gain or Loss
Depletion (Other Than Oil and Gas
Oil, Gas, and Geothermal – Income
Oil, Gas, and Geothermal – Deductions
Other AMT Items

Credits

Low Income Housing Credit (Other)
Qualified Rehabilitation Expenditures
Other Rental Real Estate Credits
Other Rental Credits
Other Credits
Credit for Alcohol Used As Fuel
Work Opportunity Credit
Disabled Access Credit
Empowerment Zone and Renewal Community
Credit for Increasing Research Activities
Credit for Employer Social Security
Employee Retention Credit
Employer Housing Credit
Electricity Produced in a Facility
Electricity, Refined Coal
Welfare-To-Work Credit
Small Employer Pension Plan Credit

Tax-exempt Income and NonDeductible Expenses

Tax-exempt Interest Income
Other Tax Exempt Income
Nondeductible Expenses

Other Information

Distributions of Cash
Distributions of Other Property
Distributions Subject to Section 737
Investment Income
Investment Expense
Qualified Rehabilitation Expenditures
Basis of Energy Property

5 - 1065 P5

Form 1065 – Partnership Return of Income

Schedule L Balance Sheet

Assets - Beginning of Year

Cash
Notes and Accounts Receivable
Bad Debts allowance
Inventories
US Government Obligations
Tax-Exempt Securities
Other Current Assets
Mortgage and Real Estate Loans
Other Investments
Bldg / Other Depreciable Assets
Accumulated Depreciation
Depletable Assets
Accumulated Depletion
Land (Net of Any Amortization)
Intangible Assets (Amortizable)
Less Accumulated Amortization
Other Assets

Inventories
US Government Obligations
Tax-Exempt Securities
Other Current Assets
Mortgage and Real Estate Loans
Other Investments
Bldg / Other Depreciable Assets
Accumulated Depreciation
Depletable Assets
Accumulated Depletion
Land (Net of Any Amortization)
Intangible Assets (Amortizable)
Less Accumulated Amortization
Other Assets

Assets - End of Year

Cash
Notes and Accounts Receivable
Bad Debts allowance

Liabilities - Beginning of Year

Accounts Payable
Mortgages, Notes, Bonds Under 1 Year
Other Current Liabilities
All Non-Recourse Loans
Mortgages, Notes, Bonds Over 1 Year
Other Liabilities

Partners' Capital Account

Liabilities – End of Year

Accounts Payable
Mortgages, Notes, Bonds Under 1 Year
Other Current Liabilities
All Non-Recourse Loans
Mortgages, Notes, Bonds Over 1 Year
Other Liabilities
Partners' Capital Account

Schedule M-1 - Reconciliation of Income Per Books with Income Per Return

Net Income Per Books
Sch K Income Not On Books
Guaranteed Payments
Depreciation
Travel and Entertainment
Other

Income Not Included on Sch K:

Tax Exempt Interest
Other

Deductions Included on Sch K:

Depreciation
Other

Schedule M-2 – Analysis of Partner's Capital Accounts

Balance at Beginning of Year

Capital Contributed:

Cash
Property
Other Increases

Distributions:

Cash
Property
Other Decreases

K1 – Partner K-1

Form 1065 – Schedule K-1, Partner's Share

Part II – Information About the Partner

Partner Name (First Line)
Street Address
City, State, Zip
SSN
EIN
Final K1
Tax Matters Partner
General Partner
Limited Partner (Not Subject to SE Tax)

Foreign Partner
Type of Entity
Partners Share Of:
Profit – Beginning
Profit – Ending
Loss – Beginning
Loss – Ending
Capital – Beginning
Capital – Ending

UVK1 – UnivK-1

Tax Basis
GAAP
Section 704(b)

Other
Other – Explain

K1PT– PT K1 Recd

Partnership Sch K-1 Received From Another Partnership

Entity Identification Number
Entity Name

Royalty Income
Net Short-term Capital Gain of (Loss)
Net Long-term Capital Gain or (Loss)
Collectibles (28% Rate) Gain or (Loss)
Unrecaptured Section 1250 Gain
Net Section 1231 Gain or (Loss)
Other Income or (Loss)

Income or Loss

Ordinary Business Income or (Loss)
Net Rental Real Estate Income or (Loss)
Other Net Rental Income or (Loss)
Guaranteed Payments to Partner
Interest Income
Ordinary Dividends
Qualified Dividends

Section 179 Expense

Section 179 Expense Deduction

Other Deductions

Credit and Credit Recapture

Alternative Minimum Tax (AMT) Items

FT – Foreign Tran

Form 1065- Schedule K – Foreign Transactions

Code of Country or US Possession
Gross Income from All Sources
Gross Income Sourced at Partner Level

Foreign Gross Income Sourced at Partnership Level

Type of Activity:
Foreign Gross Income
Deductions Allocated

Deductions Allocated and Apportioned Partner Level

D - Sch D

Partnership Schedule D – Capital Gains and Losses

Details on Sales

1099 Transactions Property Description
Acquired Date
Sold Date
Term

F - Schedule F

Schedule F Farm Income and Expense

Principal Product
Agricultural Activity Code
Taxpayer Materially Participates

Part I - Farm Income – Cash Method

Sale – Livestock and Other Items Bought for Resale
Cost – Livestock, Other Items Reported on Ln 1
Sale of Livestock and Other Products Raised
Total Cooperative Distributions Amount
Taxable Amount
Agricultural Program Payments
Taxable Amount
Commodity Credit Corporation (CCC) Loans:
CCC Loans Reported Under Election
CCC Loans Forfeited
Taxable Amount
Crop Insurance Proceeds and Payments:
Amount Received in 2008
Taxable Amount
Elect to Defer to 2009

Tax -exempt Income and Nondeductible Expenses

Other Information

Interest Expense
Other

Other Information

Foreign Taxes Paid
Foreign Taxes Accrued
Reduction in Taxes Available for Credit
Foreign Trading Gross Receipts
Extraterritorial Income Exclusion
Other Foreign Transactions

Sales Price
Cost or Basis
Gain or Loss

Amount deferred from 2007
Custom Hire (Machine Work) Income
Other Income

Part II - Farm Expense – Cash Method and Accrual Method

Car / Truck Expenses
Chemicals
Conservation Expense
Custom Hire
Employee Benefit Programs
Feed Purchase
Fertilizers and Lime
Freight and Trucking
Gasoline Fuel and Oil
Insurance (Not Health)
Interest:
Mortgage Pd to Banks, Etc
Other
Labor Hired Less Emp Credits
Pension and Profit Share

Rent or Lease:
Machinery and Equipment
Other (Land, Animals)
Repairs and Maintenance
Seeds and Plants
Storage / Warehousing
Supplies Purchased
Taxes
Utilities
Vet, Breeding, Medicine
Amortization
Other Expenses

Total Coop Distributions (1099-PATR)
Taxable Amount
Agricultural Program Payments
Taxable Amount
Commodity Credit Corporation (CCC) Loans:
CCC Loans Reported Under Election
CCC Loans Forfeited
Taxable Amount
Crop Insurance Proceeds
Custom Hire (Machine Work) Income
Other Income
Inventory – Livestock, etc at Beginning of Year
Cost of Livestock, Produce, etc During Year
Inventory of Livestock, etc at End of Year

Part III - Farm Income - Accrual Method

Unit – Livestock or Farm Price Method Used
Sale of Livestock, Produce, Grains, Etc

6252 – Form 6252

Form 6252 – Installment Sale Income

Description
Date Acquired
Date Sold
Property Was Sold to Related Party After May
14, 1980
Property Sold to Related Party Was a
Marketable Security
Carry to Form 4797

Total Unrecaptured Section 1250 Gain

Part III – Related Party Installment Sale Income

Related Party Name
Social Security Number
Federal EIN
State Address
ZIP Code (City, State, ZIP)
Did Related Party Resell or Dispose of Property
During Tax Year
Second Disposition More Than 2 Years
Date of Disposition
First Disposition was Sale or Exchange of Stock
Second Disposition was Involuntary Conversion
Second Disposition Occurred After Death of
Seller
Tax Avoidance Was Not a Principal Purpose
Selling Price of Property Sold by Related Party
Contract Price from Ln 18 for Year of First Sale
Total Payments Received
Portion of Ln 35 That Is Ordinary Income

Part I – Gross Profit and Contract Price

Selling Price
Mortgage Purchaser Assumes
Cost or Other Basis of Property Sold
Depreciation Allowed
Commissions and Other Expenses of Sale
Income Recapture from Form 4797, Line 31
If Main Home, Amount of Excluded Gain

Part II - Installment Sale Income

Gross Profit Ratio - Federal
Total Payments Received During Year
Payments Received in Prior Years
Portion Taxable as Ordinary Income

SCHA - Form 8609-A

**Form 8609-A – Annual Statement for Low-
Income Housing Credit**

Part I – Compliance Information

Date Building Put in Service
Building Identification Number
A Newly Constructed Building
Section 42(d) Rehabilitation Expenditures
Is the Original Form 8609 in Records

Building Qualifies As Part of Qualified Low-
Income Housing Project
Was There a Decrease in Qualified Basis
Entire Credit Was Claimed in Prior Years

Part II – Computation of Credit

Eligible Basis of Building

Low-Income Percentage
Credit Percentage from Form 8609, Part I, Ln 2
Original Qualified Basis at Close of 1st Year
Qualified Basis of Building from Previous Year
Amount from Previous Year's Sch A, Ln 1
Amount from Previous Years Sch A, Ln 2
(Percentage)

Total of All Federal Grants
Amount on Form 8609, Part 1, Line 1b
Percent of Interest in This Building
Proportionate Share of Credit
Pro Rata Reduction for the Increased Credit
Prior Year

8825 - Form 8825

Rental Real Estate Income and Expenses

Property Kind
Property Location

Income

Gross Rents

Expenses

Advertising
Auto and Travel
Cleaning and Maintenance
Commissions

Insurance
Legal and Other Professional Fees
Interest Expense
Repairs
Taxes
Utilities
Wages and Salaries
Depreciation
Other Expenses

Depr – Depr Wkst

Description
Type
Date
Fed – Cost
Fed – Current Sec 179
Fed – Prior Sec 179
Fed – Curr Sp Allow
Fed – Land
Fed – Basis
Fed – Method
Fed – Period
Fed – Current Deprec
Fed – Prior Deprec
Fed – Override Current

AMT – Cost
AMT – Current Sec 179
AMT – Prior Sec 179
AMT – Cur Sp Allow
AMT – Land
AMT – Basis
AMT – Method
AMT - Period
AMT – Current Deprec
AMT – Prior Deprec
AMT – Override Current
Business Use Percent
Section 179 Property

ProSeries® to 1040Works® 2008

Corporation (1120) Conversion Items

The **bold titles** are the titles that correspond with the Forms Pane of the 1040Works tax program. The **underlined and bold** titles are the subtitles within the input screen.

GI - General Information

Form 1120 – General Information

Name (First Line)	Total Assets
Address	Initial Return
Zip	Final Return
City	Name Change
State	Address Change
Fiscal/Short-Year Begin	Business Activity Code Number
Fiscal/Short-Year End	Business Activity
If Short Year, Indicate Number of Months	Product or Service
Personal Holding Co	Name of Officer
Life/Nonlife Consolidated Return	Title of Office
Personal Service Corp	Corporation Phone Number
EIN	E-mail Address
Date Incorporated	IRS to Discuss Return with Preparer

1 - 1120 Page 1

Form 1120 – U.S. Corporation Income Tax Return, Page 1

Income

Gross Receipts	Current
Less Returns and Allowances	Non-Cash
Interest Income –	Depreciation Not Claimed on Sch A or Elsewhere
Interest Inc (Not US Govt)	Depreciation Claimed on Sch A and Elsewhere
Gross Rents	Depletion
Gross Royalties	Advertising
Capital Gain Net Income	Pension, Profit-sharing, Etc, Plans
Net Gain or Loss from Form 4797	Employee Benefits Programs
Other Income	Domestic Production Activities Deduction
	Other Business Deductions

Deductions

Salaries and Wages
Employment Credits
Repairs and Maintenance
Bad Debts
Rents
Taxes:
 Other
Interest Expense
Contributions:

Taxes and Payments

Refund Applied – Form 4466
Credit from Form 24398
Credit from Form 4136
Backup Withholding
Refundable Credit from Form 8800 and Form 8827
Amount Credited to 2009 Estimated Tax

2 - 1120 Pg 2

Form 1120 – U.S. Corporation Income Tax Return, Page 2

Schedule A - Cost of Goods Sold

Inventory at Beginning of Year
Purchases
Cost of Labor
Additional Section 263A Costs
Other Costs
Inventory at End of Year
Methods Used for Closing Inventory:
 Lower of Cost or Market
 Other
 Describe
Writedown of 'Subnormal' Goods
LIFO Methods – Form 970 Attached
Percentage (or Amounts) of Closing Inventory
Do Rules of Sec 263A Apply to Corporation?
Any Change in Determining Inventory
 Valuation?

Less Than 20% Owned Foreign Corp and
 Certain FSC's Subject to 70% Dedn
20% or More Owned Foreign Corp and Certain
 FSC's Subject to 80% Deduction
Wholly owned Foreign Subsidiaries Subject to
 100% Deduction
Domestic Corp Recd by Small Busn Invest Co
 Operating Under Act of 1958
Dividends from Affiliated Group Members
Dividends from Certain FSC's
Other Dividends from Foreign Corp
Income from Controlled Frgn Corp under
 Subpart F
Foreign Dividend Gross-Up
IC-DISC and Former DISC Dividends
Other Dividends
Deductions for Dividends Paid on Certain
 Preferred Stock or Public Utilities

Schedule C - Dividends and Special Deductions

Less than 20% Owned Dom Corp 70% Dedn /
 Other Than Debt-financed Stock
20%-or-More Owned Dom – 80% Dedn / Other
 Than Debt-financed Stock
On Debt-financed Stock of Domestic and
 Foreign Corporations
Certain Preferred Stock / Less Than – 20%
 Owned Public Utilities
Certain Preferred Stock of 20% - Public Utilities

Schedule E - Compensation of Officers

Name of Officer
SSN
Percentage of Time Devoted
Percentage of Corp Common Stock
Percentage of Corp Preferred Stock
Amount of Compensation
Less: Comp of Officers Claimed Elsewhere

J – 1120 Sch J

**Form 1120 – U.S. Corporation Income Tax
Return, Page 3**

Schedule J - Tax Compensation

Are You a Member of a Controlled Group?

K – 1120 Sch K

Accounting Method:
 Accrual
 Other
 Specify
Business Activity Code Number
Business Activity
Product or Service
Is Corporation a Subsidiary in Affiliated Group
If 'Yes' –
 Name
 EIN
Did Corporation, Partnership, or Trust Own
 Directly 20% or More of Corporations Stock
 Entitled to Vote
If 'Yes' –
 Name
 EIN

Type of Entity
Country of Organization
% Voting Stock
Did Individual/Estate Own Directly 20% or More
 of Corporations Stock Entitled to Vote
If 'Yes' –
 Name of Individual or Estate
 ID #
 Country of Citizenship
 % Voting Stock
Did Corporation Own Directly 20% or More of
 Stock Entitled to Vote of Any
 foreign/Domestic Corp
If 'Yes' –
 Name of Corporation
 EIN
 Country of Incorporation

% Voting Stock
 Did Corporation Directly Own 20% or More in
 Any Foreign/Domestic Partnership, or in
 Beneficial Interest of a Trust
 If "Yes" –
 Name of Entity
 EIN
 Country of Organization
 Maximum % Profit, Loss, or Capital
 Did Corporation Pay Dividends in Excess of
 Current Earnings Profit
 Foreign Person Owned 25% Total Voting Power

If "Yes":
 Percentage Owned
 Owner's Country
 Number of Form(s) 5472 Attached
 Issued Publicly Offered Debt Instruments
 Tax-Exempt Interest
 Number of Shareholders if 100 or Fewer
 NOL and Electing to Forego Carryback Period
 Available NOL Carryover Prior Years
 Corporation Total Receipts
 If Yes, Enter Total Cash Distributions

5 - 1120 Pg 5

**Form 1120 – U.S. Corporation Income Tax
 Return, Page 4**

Schedule L - Balance Sheets

Assets – Beginning of Tax Year

Cash
 Trade Notes and Accounts Receivable
 Less Bad Debt Allowance
 Inventories
 US Government Obligations
 Tax Exempt Securities
 Other Current Assets
 Loans to Stockholders
 Mortgage and Real Estate Loans
 Other Investments
 Bldgs / Other Depreciable Assets
 Less Accumulated Depreciation
 Depletable Assets
 Less Accumulated Depletion
 Land (Net of Any Amortization)
 Intangible Assets (Amort Only)
 Less Accumulated Amortization
 Other Assets

Assets – End of Tax Year

Cash
 Trade Notes and Accounts Receivable
 Less Bad Debt Allowance
 Inventories
 US Government Obligations
 Tax Exempt Securities
 Other Current Assets
 Loans to Stockholders
 Mortgage and Real Estate Loans
 Other Investments
 Bldgs / Other Depreciable Assets
 Less Accumulated Depreciation
 Depletable Assets
 Less Accumulated Depletion
 Land (Net of Any Amortization)
 Intangible Assets (Amort Only)

Less Accumulated Amortization
 Other Assets

Liabilities – Beginning of Tax Year

Accounts Payable
 Notes Payable in Under 1 Year
 Other Current Liabilities
 Loans from Stockholders
 Notes Payable in Over 1 Year
 Other Liabilities
 Capital – Preferred Stock
 Capital Common Stock
 Paid-in or Capital Surplus
 Retained Earnings: Appropriated
 Retained Earnings: Unappropriated
 Adj to Shareholder Equity
 Less Cost of Treasury Stock

Liabilities – End of Tax Year

Accounts Payable
 Notes Payable in Under 1 Year
 Other Current Liabilities
 Loans from Stockholders
 Notes Payable in Over 1 Year
 Other Liabilities
 Capital – Preferred Stock
 Capital Common Stock
 Paid-in or Capital Surplus
 Retained Earnings: Appropriated
 Retained Earnings: Unappropriated
 Adj to Shareholder Equity
 Less Cost of Treasury Stock

**Schedule M1 - Reconciliation of Book and
 Taxable Income**

Net Income Per Books

Excess Capital Loss Over Capital Gains
Taxable Income Not On Books
Depreciation
Other
Tax-Exempt Interest
Other
Depreciation
Other

**Schedule M2 - Analysis of Unappropriated
Retained Earnings Per Books**

Balance at Beginning of Year
Other Increases
Distributions:
Cash
Stock
Property
Other Decreases

ES - Estimates

Corporation Estimated Tax

2007 Estimated Tax Payments

Prior Year's Overpayment Applied
Backup Withholding
1st Estimated Payment
Date
Amount
2nd Estimated Payment
Date
Amount
3rd Estimated Payment
Date
Amount
4th Estimated Payment
Date
Amount

5th Estimated Payment
Date
Amount
6th Estimated Payment
Date
Amount
7th Estimated Payment
Date
Amount
8th Estimated Payment
Date
Amount
Extension Payment

D - Schedule D

Schedule D – Capital Gains and Losses

Details on Sales

1099 Transactions Prop Desc
Acquired Date
Sold Date

Term
Sales Price
Cost or Basis

N - Schedule N

**Form 1120 Schedule N – Foreign Operations of
U.S. Corporations**

Did Corporation Own Any Foreign Entities
Number of Forms 8865 Attached
Number of Forms 8865 Attached
Did any Corp Own at Least 10% Interest in Any
Other Foreign Partnership
If Yes:
Name of Partnership
EIN
Forms Filed
Name of Tax Matters Partner

Foreign Partnership Tax Year – Beginning
Foreign Partnership Tax Year - Ending
Did Corporation Receive Distribution From, or
Was It Grantor of a Foreign Trust
Did Corporation Have Interest in or Signature or
Other Authority over Financial Account
If yes, Name of Foreign Country
Is Corp Claiming Extraterritorial Income Excl
If Yes, Number of Forms 8873 Attached
If Yes, Total of Line 54 Amounts from All 8873

PH1 - Sch PH Pg 1

Sch PH – U.S. Personal Holding Co (PCH) Tax

**Part I Undistributed Personal Holding Co
Income**

Additions

Taxable Income Before NOL
Contributions Deducted in Figuring Ln 1

Deductions

Federal and Foreign Income, War Profits
Contributions Deducted Under Sec 545(b)(2)
NOL for Preceding Tax Year
Net Capital Gain
Income Tax on Net Capital Gain
Dividends Paid After End of Tax Year

Part II Personal Holding Company Income

Dividends

PH2 - Sch PH Pg 2

**Schedule PH – U.S. Personal Holding Company
(PHC) Tax, Page 2**

**Part IV – Stock Ownership Requirement Under
Section 452(a)(2)**

Name
Address
City, State, Zip
Preferred Stock
Common Stock

Part V – Excess of Expenses and Depreciation

Description of Property
Date Acquired
Cost or Other Basis

PTK1 – PT K1 Recd

Schedule K-1 Received From a Partnership

Entity Identification Number
Entity Name
Foreign Partnership
Final Disposition

Income or Loss

Ordinary Business Income
Net Rental Real Estate Income
Other Net Rental Income
Guaranteed Payments to Partner
Interest Income
Ordinary Dividends
Royalty Income
Net Short-term Capital Gain
Net Long-term Capital Gain

Interest
Interest – Amounts Excluded
Royalties (Other Than Mineral, Oil, Gas)
Annuities
Rents
Adjustments to Rents
Mineral, Oil, and Gas Royalties
Adjustments to Mineral, Oil, and Gas Royalties
Copyright Royalties
Produced Film Rents
Compensation Rcvd for Use of Corp Property
Amounts Rcvd under Personal Service
Contracts
Amounts Includible In Taxable Income

Depreciation Deduction
Repairs, Insurance, Other
Income from Rent or Other

Part VI – Deduction for Dividends Paid

Taxable Dividends Paid
Consent Dividends
Dividends Carryover from 1st and 2nd
Preceding Tax Years

Net Section 1231 Gain
Other Income or Loss

Section 179 Deduction

Section 179 Expense Deduction

Other Deductions

Credits and Credit Recapture

Alternative Minimum Tax (AMT) Items

**Tax-Exempt Income and Nondeductible
Expenses**

Other Information

NOL – NOL Deduction

Federal NOL Carryforward Worksheet

Net Operating Loss

2007 Net Operating Loss Generated Amount	Amount
2006 Net Operating Loss Generated Amount	1999 Net Operating Loss Generated Amount
2005 Net Operating Loss Generated Amount	1998 Net Operating Loss Generated Amount
2004 Net Operating Loss Generated Amount	1997 Net Operating Loss Generated Amount
2003 Net Operating Loss Generated Amount	1996 Net Operating Loss Generated Amount
2002 Net Operating Loss Generated Amount	1995 Net Operating Loss Generated Amount
2001 Net Operating Loss Generated Amount	1994 Net Operating Loss Generated Amount
2000 Net Operating Loss Generated Amount	1993 Net Operating Loss Generated Amount

2220 - Form 2220

Form 2220 Underpayment of Estimated Tax

Part I – Required Annual Payment

Total Tax	Due Date – 9 th Month
Interest Due Under Look-Back Method	Due Date 12 th Month
Prior Year Tax	

Part III – Figuring the Underpayment

Fiscal Year
Due Date – 4 th Month
Due Date – 6 th Month

Schedule A – Part ii – Annualized Income

Annualization Options:
Option 1
Option 2

4626 – Fm 4626 Pg1

Form 4626 Alternative Minimum Tax

Adjustments and Preferences

This is a Small Corporation Exempt from AMT	Other Adjustments
Depreciation of Post-1986 Property	Adjusted Current Earnings
Amortization of Pollution Control Facilities	Excess Total AMTI from Prior Year
Amortization of Mining Exploration and Development Costs	Alternative Tax Net Operating Loss Deduction
Amortization of Circulation Expenditures	Alternative Minimum Tax Foreign Tax Credit
Adjusted Gain or Loss	
Long-term Contracts	
Merchant Marine Capital Construction Funds	
Section 833(b) Deduction	
Tax Shelter Farm Activities	
Passive Activities	
Loss Limitations	
Depletion	
Tax-exempt Interest from Private Activity Bonds	
Intangible Drilling Costs	

Adjusted Current Earnings Worksheet

AMT Depreciation
Post-1983 Property
Post-1989, Pre-1994 Property
Pre-1990 MACRS Property
Pre-1990 Original ACRS Property
Property Described in Sec 168(F)(1)-(4)
Other Property
Tax-Exempt Interest Income
Death Benefits from Life Insurance

All Other Life Insurance Distributions
 Inside Build-up in Life Insurance
 Other Items
 Certain Dividends Received
 Dividends Paid on Certain Preferred Stock
 Dividends Paid to an ESOP
 Non-patronage Dividends
 Other Items
 Intangible Drilling Costs

Circulation Expenditures
 Organization Expenditures
 LIFO Inventory Adjustments
 Installment Sales
 Disallowance of Loss on Exchange of Debt Pool
 Acquisition Expense of Life Insurance Co
 Depletion
 Basis Adjustment

AMNOL – NOL Deduction

Federal AMT Net Operating Loss Worksheet

2007 Net Operating Loss Generated Amount
2006 Net Operating Loss Generated Amount
2005 Net Operating Loss Generated Amount
2004 Net Operating Loss Generated Amount
2003 Net Operating Loss Generated Amount
2002 Net Operating Loss Generated Amount
2001 Net Operating Loss Generated Amount
2000 Net Operating Loss Generated Amount

Amount
1999 Net Operating Loss Generated Amount
1998 Net Operating Loss Generated Amount
1997 Net Operating Loss Generated Amount
1996 Net Operating Loss Generated Amount
1995 Net Operating Loss Generated Amount
1994 Net Operating Loss Generated Amount
1993 Net Operating Loss Generated Amount

Form 6252 – Installment Sale Income

Description
 Date Acquired
 Date Sold

Related Party Name
 Social Security Number
 Federal EIN
 Street Address
 ZIP Code (C/S/Z)
 Did Related Party Resell or Dispose of Property During Year
 Second Disposition More Than 2 Years after The First
 Date of Disposition
 First Disposition Was Sale or Exchange of Stock
 Second Disposition Was Involuntary Conversion
 Second Disposition Occurred After Death of Original Seller
 Tax Avoidance Was Not A Principal Purpose of Disposition
 Selling Price of Property Sold
 Contract Price from Ln 18
 Total Payments Received
 Portion of Ln 35 That Is Ordinary Income

Part I – Gross Profit

Selling Price
 Mortgages Purchaser Assumes
 Cost or Other Basis of Property Sold
 Depreciation Allowed or Allowable
 Commissions and Other Expenses of Sale
 Income Recapture from Form 4797
 If Main Home, Amount of Excluded Gain

Part II – Installment Sale Income

Gross Profit Ratio
 Total Payments Received During Year
 Payments Received in Prior Years
 Portion Taxable As Ordinary Income

Part III– Related Party Installment Sale Income

SCHA – Sch A/8609

Form 8609-A - Low-Income Housing Credit

Part I – Compliance Information

Date Building Was Placed in Service
Building Identification Number
A Newly Constructed or Existing Building
Section 42(e) Rehabilitation Expenditures
Is the Original Form 8609 In Taxpayers Records
Building Qualifies as Low-Income Housing
Was There a Decrease Qualified Basis
Entire Credit Was Claimed In Prior Years

Credit Percentage from Form 8609, Pt I, Ln 2
Original Qualified Basis of Building at Close of
First Year
Qualified Basis of Building from Previous Year's
Sch A, Line 3
Total of All Federal Grants for This Building
Amount on Form 8609, Part I, Line 1b
Percent of Interest In This Building If Less Than
100%
Proportionate Share of Credit
Pro Rata Reduction for the Increased Credit in
Prior Year

Part II – Computation of Credit

Eligible Basis of Building from Form 8609, Part
II, Line 7b
Low-income Percentage

CHAR - Charitable

Federal Charitable Contributions

2008 Full Amount of Current Year Charitable
Contributions
Total Non-Cash Contributions
2007 Charitable Contrib Carryforward

2006 Charitable Contrib Carryforward
2005 Charitable Contrib Carryforward
2004 Charitable Contrib Carryforward
2003 Charitable Contrib Carryforward

Depr – Depr Wkst

Description
Type
Date
Fed – Cost
Fed – Current Sec 179
Fed – Prior Sec 179
Fed – Curr Sp Allow
Fed – Land
Fed – Basis
Fed – Method
Fed – Period
Fed – Current Deprec
Fed – Prior Deprec
Fed – Override Current

AMT – Cost
AMT – Current Sec 179
AMT – Prior Sec 179
AMT – Cur Sp Allow
AMT – Land
AMT – Basis
AMT – Method
AMT - Period
AMT – Current Deprec
AMT – Prior Deprec
AMT – Override Current
Business Use Percent
Section 179 Property

ProSeries® to 1040Works® 2008

S-Corporation (1120S) Conversion Items

The **bold titles** are the titles that correspond with the Forms Pane of the 1040Works tax program. The **underlined and bold** titles are the subtitles within the input screen.

GI - General Information

General Information

Name (First Line)	Date Incorporated
Name (Second Line)	Initial Return
Street Address	Final Return
Zip Code	Name Change
City	Address Change
State	Amended Return
Fiscal/Short-Year Beginning	S-Election Termination or Revocation
Fiscal/Short-Year End	Name of Officer
S-Corp Election Date	Title of Officer
Business Code Number	S-Corp Phone Number
Business Activity	Fax Number
Product or Service	E-Mail Address
EIN	Authorize IRS to Discuss Return with Preparer

1 - 1120S Pg 1

Form 1120S – U.S. Tax Return for an S Corporation

Income

Gross Receipts or Sales	Depreciation Not Claimed on Sch A
Less Returns and Allowances	Depletion (Not Oil and Gas)
Net Gain (Loss) from Form 4797	Advertising
Other Income (Loss)	Pension, Profit Sharing, Plans, Etc
Total Income	Employee Benefit Programs
	Other Deduction

Deductions

Compensation of Officers
Salaries and Wages
Less Employment Credits
Repairs and Maintenance
Bad Debts
Rents
Taxes:
License
Payroll
Real Estate
State Income
Other
Interest

Tax and Payments

TAX:
Excess Net Passive Income Tax or LIFO
Recapture Tax
Tax from Schedule D
Sec 47 Recapture Tax
PAYMENTS:
Amount Applied from Last year's Return
Tax Deposited With Form 7004
Credit for Federal Tax Paid on Fuels
Estimated Tax Penalty
Amount Credited to Next Year's Est Tax

2 - Form 1120S, Pg 2

Form 1120S – Income Tax Return for an S Corporation, Page 2

Schedule A - Cost of Goods Sold

Inventory at Beginning of Year
Purchases
Cost of Labor
Additional Sec 263A Costs
Other costs
Inventory at End of Year
Inventory Method
(Default = Cost)
Lower of Cost or Market
Other
Specify Method
Write Down of 'Subnormal' Goods
LIFO Methods Adopted
Percentage of Closing Inventory Computed
Under LIFO
Do Section 263A Rules Apply to Corporation
Any Change in Inventory Valuation

Schedule B - Other Information

Accounting Method:
(Program Will Default to Cash)
Accrual
Other
Specify Method of Accounting
Business Activity
Product or Service
Business Code Number

3 - 1120S, Pg 3

**Form 1120S – Income Tax Return for an S Corp,
Page 3**

Sch K (Continued)

Deductions

Investment Interest Expense
Section 59(e)(2) Expenditures
Type of Expenditure
Other Deductions

Credits

Low-Income Housing Credit
Low-Income Housing Credit (Other)
Qualified Rehab Expenditures
Other Rental Real Estate Credit
Other Rental Credit
Alcohol and Cellulosic Biofuels Credit

Alternative Minimum Tax Items

Post-1986 Depreciation Adj

4 – 1120S Pg 4

Schedule L - Balance Sheets

Own 50% or More of Domestic Corp

Name of Corporation
Employer ID Number
Percent Owned
If 100% Was QSub Election Made
Has Corporation Filed a Return Under Sec 6111
Issued Publicly Offered Debt Instrument
Net Unrealized Built-in Gain Reduced
Accumulated Earnings at End of Year
Corporation Total At End of Year Less Than
\$250,000

Schedule K – Shareholders Share of Income

Ordinary Income
Net Income from Rental Real Estate
Gross Income from Other Rental Activities
Less Other Rental Expenses
Interest Income:
Interest Inc (Not US Govt)
US Govt Savings Bonds
Total Ordinary Dividends
Qualified Dividends
Royalty Income
Net-Short Term Capital Gain
Net-Long Term Capital Gain
Collectibles (28%) Gain
Unrecaptured Sec 1250 Gain
Net Section 1231 Gain

Adjusted Gain or Loss
Depletion (Not Oil and Gas)
Oil, Gas, and Geothermal – Income
Oil, Gas, and Geothermal – Deductions
Other AMT Items

Items Affecting Shareholder Basis

Other Tax-Exempt Income
Other Nondeductible Expenses
Property Distributions (Including Cash)

Other Information

Investment Income
Investment Expenses
Dividend Distributions

Assets – Beginning of Tax Year

Cash
Notes and Accounts Receivable
Bad Debt Allowance
Inventories
US Government Obligations
Tax Exempt Securities
Other Current Assets
Loans to Shareholders
Mortgage and Real Estate Loans
Other Investments
Bldgs / Other Depreciable Assets
Less Accumulated Depreciation
Depletable Assets
Less Accumulated Depletion
Land (Net of Any Amortization
Intangible Assets (Amort Only)
Accumulated Amortization
Other Assets

Assets – End of Tax Year

Cash
Notes and Accounts Receivable
Bad Debt Allowance
Inventories
US Government Obligations
Tax Exempt Securities
Other Current Assets
Loans to Shareholders
Mortgage and Real Estate Loans
Other Investments
Bldgs / Other Depreciable Assets
Less Accumulated Depreciation
Depletable Assets
Less Accumulated Depletion
Land (Net of Any Amortization
Intangible Assets (Amort Only)
Accumulated Amortization
Other Assets

Liabilities – Beginning of Tax Year

Accounts Payable
Notes Payable in Less Than 1 Year
Other Current Liabilities
Loans from shareholders
Notes Payable in 1 Year or More
Other Liabilities
Capital Stock
Additional Paid-in Capital
Retained Earnings

Adjustments to Shareholders Equity
Cost of Treasury Stock

Liabilities – Ending of Tax Year

Accounts Payable
Notes Payable in Less Than 1 Year
Other Current Liabilities
Loans from shareholders
Notes Payable in 1 Year or More
Other Liabilities
Capital Stock
Additional Paid-in Capital
Retained Earnings
Adjustments to Shareholders Equity
Cost of Treasury Stock

Schedule M1 - Reconciliation of Income Per Books

Net Income Per Books
Sch K Income Not on Books
Book Expense Not Deducted:
 Depreciation
 Travel
 Other
Income Not Included On Return This Year:
 Tax-exempt Interest
 Other
Deductions Not Charged Against Books:
 Depreciation
 Other

Schedule M2 - Analysis of Unappropriated Retained Earnings Per Books

Beginning Balance:
 Accumulated Adjustments Account
 Other Adjustments Account
 Shareholder Undistrib Txbl
Other Additions:
 Accumulated Adjustments Account
 Other Adjustments Account
Other Reductions:
 Accumulated Adjustments Account
 Other Adjustments Account
Distribution:
 Accumulated Adjustments Account
 Other Adjustments Account
 Shareholder Undistrib Txbl

K1 – Shareholder K-1

General Information

Shareholder's Name

Domestic or Foreign Street Address

Domestic zip code – City, State, Zip
SSN

EIN
Shareholder's Percentage of Stock Ownership

K1PT – PT K1 Recd

Description / Distributive Share Items

Entity Identification Number
Entity Name

Foreign Entity
Final Disposition

Income Or Loss

Ordinary Business Income
Net Rental Real Estate Income
Other Net Rental Income
Guaranteed Payments
Interest Income
Interest on U,S, Government Obligations
Ordinary Dividends
Qualified Dividends

Royalties
Net Short-term Capital Gain
Net Long-term Capital Gain
Collectibles (28% Rate) Gain
Unrecaptured Section 1250 Gain
Net Section 1231 Gain
Other Income

Section 179 Deduction

Section 179 Expense Deduction

Other Deductions

Credits and Credit Recapture

Alternative Minimum Tax (AMT) Items

FT – Foreign Transactions

Code of Country or US Possession
Gross Income from All Sources
Gross Income Sourced at Shareholder Level

Interest Expense
Other

Foreign Gross Income Sourced at Corporate Level

Type of Activity
Foreign Gross Income
Deductions Allocated

Other Information

Foreign Taxes Paid
Foreign Taxes Accrued
Reduction in Taxes Available for Credit
Foreign Trading Gross Receipts
Extraterritorial Income Exclusion
Other Foreign Transactions

Deductions Allocated and Apportioned at Shareholder Level

ES - Estimates

Prior Year's Overpayment Applied

1st Estimated Payment
Payment Date
Amount Paid

2nd Estimated Payment
Payment Date
Amount Paid

3rd Estimated Payment
Payment Date
Amount Paid

4th Estimated Payment
Payment Date

Amount Paid
5th Estimated Payment
Payment Date
Amount paid

6th Estimated Payment
Payment Date
Amount paid

7th Estimated Payment
Payment Date
Amount paid

8th Estimated Payment
Payment Date

Amount paid

Extension Payment

D - Schedule D

Details on Sales of Short-Term & Long-Term Capital Gains and Losses

1099 Transactions Prop Desc
Acquired Date
Sold Date
Term
Sales Price
Cost or Basis

Long-Term Capital Gain – 28% Rate
Long-Term Capital Gain fro Like-Kind Exchanges
Long-Term from Like-Kind Exchanges – 28% Rate
Capital Gain Distributions
Capital Gain Distributions – 28% Rate
Portion of Long-Term Capital Gain to Carry to Sch K

Part I – Short Term Capital Gains and Losses

Short-Term Capital Gain from Installment Sales
Short-Term Capital Gain from Like-Kind Exchanges
Portion of Short-Term Capital Gain

Part III – Tax Imposed on Certain Built-In Gains

Excess of Recognized Built-in Gains Over Losses
Taxable Income
Section 1374(b)(2) Deduction
Business Credit and Minimum Tax Credit
Carryforwards

Part II – Assets Held More Than 1 Year

Long-Term Capital Gain from Installment Sales

F - Schedule F

Schedule F - Farm Income and Expense

Principal Product
Agricultural Activity Code
Employer ID No
Taxpayer Materially Participates

Part I - Farm Income (Cash Method)

Sale - Livestock and Other Items Bought for Resale
Cost - Livestock and Other Items Reported on Line 1
Sale of Livestock, Produce, Grains and Other Products Raised
Total Cooperative Distributions Amount (1099-PATR)
Taxable Amount
Agricultural Program Payments:
Taxable Amount
Commodity Credit Corp (CCC) Loans:
CCC Loans Reported under Election
CCC Loans Forfeited
Taxable Amount
Crop Insurance Proceeds and Federal Crop Disaster Payments:
Amount Received in 2008
Taxable Amount
Elect to Defer to 2009
Amount Deferred from 2007
Custom Hire (Machine Work) Income
Other Income

Part - III Farm Expenses – Cash and Accrual Method

Car / Truck Expense
Chemicals
Conservation Expense
Custom Hire
Depreciation
Employee Benefit Programs
Feed Purchased
Fertilizers and Lime
Freight and Trucking
Gasoline Fuel and Oil
Insurance (Not Health)
Interest:
Mortgage Paid to Banks
Other
Labor Hired Less Employment Credits
Pension/Profit Sharing Shares
Rent or Lease:
Machinery, Equipment
Other (Land, Animals)
Repairs and Maintenance
Seeds and Plants
Storage / Warehousing
Supplies Purchased
Taxes
Utilities
Vet, Breeding, Medicine
Other Expenses:

Part III - Farm Income – Accrual Method

Unit – Livestock or Farm Price Method Used
Sale of Livestock, Produce, Grains and Other
Products Raised
Total Cooperative Distributions Amount (1099-
PATR)
Taxable Amount
Agricultural Program Payments
Taxable Amount

Commodity Credit Corporation (CCC) Loans:
CCC Loans Reported under Election
CCC Loans Forfeited
Taxable Amount
Crop Insurance Proceeds
Custom Hire (Machine Work) Income
Inventory - Livestock at Beginning of Year
Cost of Livestock, Produce during Year
Inventory - Livestock at End of Year

6252 – Form 6252

Form 6252 - Installment Sale Income

Description
Date Acquired
Date Sold
Property Sold to Related Party after May 14,
1980
Property Sold to Related Party Was a
Marketable Security

Total Unrecaptured Section 1250 Gain

Part I – Gross Profit and Contract Price

Selling Price
Mortgage Purchaser Assumes
Cost or Other Basis of Property Sold
Depreciation Allowed or Allowable
Commissions and Other Expenses of Sale
Income Recapture from Form 4797
If Main Home, Amount Excluded Gain

Part III –Related Party Installment Sale Income

Related Party Name
Social Security Number
Federal EIN
Street Address
ZIP Code – City, State, Zip
Did Related Party Resell During Tax Year
Second Disposition More Than 2 Years
Date of Disposition
First Disposition Was Sale or Exchange of Stock
Second Disposition Occurred After Death of
Original Seller or Buyer
That Tax Avoidance Was Not a Principal
Purpose for Either of the Dispositions
Selling Price of Property Sold By Related Part
Contract Price from Line 18
Total Payments Received by End of Year
Portion of Ln 35 That Is Ordinary Income

Part II – Installment Sale Income

Gross Profit Ratio – Federal
Total Payments Received During Year
Payments Received in Prior Years
Portion Taxable As Ordinary Income

SCHA – Sch A/8609

**Form 8609-A - Annual Statement for Low-
Income Housing Credit**

Part I – Compliance Information

Date Building Was Placed In Service
Building Identification Number
A Newly Constructed or Existing Building
Section 42(e) Rehabilitation Expenditures
Is The Original Form 8609 Maintained in
Taxpayer's Records
Building Qualifies as Part of Qualified Low-
income Housing Project
Was There a Decrease In Qualified Basis of
Building Checkbox
Entire Credit Was Claimed On Prior Tax Years

Eligible Basis of Building from Form 8609, Part
II, Line 7b
Low-income Percentage
Credit Percentage from Form 8609, Part I, Ln 2
Original Qualified Basis of Building at Close of
First Year
Qualified Basis of Building from Previous Year's
Sch A, Ln 3
Amount on Form 8609, Part I, Line 1b
Percent of Interest In Bldg If Less Than 100%
Proportionate Share of Credit
Pro Rata Reduction for the Increased Credit in
Prior Year

Part II – Computation of Credit

8825 – Form 8825

Form 8825 - Rental Real Estate Income and Expenses

Property Kind
Property Location

Income

Gross Rents

Expenses

Advertising
Auto and Travel
Cleaning and Maintenance
Commissions

Insurance
Legal and Other Professional Fees
Interest Expense
Repairs
Taxes
Utilities
Wages and Salaries
Depreciation
Other Expenses

8826 – Form 8826

Form 8826 - Disabled Access Credit

Part I – Current Year Credit

Total Eligible Access Expenditures

Disabled Access Credits

8844 – Form 8844

Form 8844 - Empowerment Zone Credit

Qualified Empowerment Zone Wages
Qualified Renewal Community Wages

Empowerment Zone

8846 – Form 8846

Form 8846 - Credit for Employer Social Security

Employee Tips on Which Employer Paid Social Security and Medicare Taxes During Tax Year
Tips Not Subject to Credit Provisions
Tips Subject Only to Medicare Tax
Credit for Employer Social Security and Medicare Taxes Paid on Certain Employee Tips from Partnerships
Credit for Employer Social Security and Medicare Taxes Paid on Certain Employee Tips Included on Line 6

Credit for Employer Social Security and Medicare Taxes Paid on Tips Allowed for 2008 from Passive Activities
Carryforward of Credit for Employer Social Security and Medicare Taxes Paid on Tips That Originated In A Tax Year That Began After 2006
Carryback From 2009 Credit

Depr – Depr Wkst

Description
Type
Date
Fed – Cost
Fed – Current Sec 179
Fed – Prior Sec 179
Fed – Curr Sp Allow
Fed – Land
Fed – Basis

Fed – Method
Fed – Period
Fed – Current Deprec
Fed – Prior Deprec
Fed – Override Current
AMT – Cost
AMT – Current Sec 179
AMT – Prior Sec 179
AMT – Cur Sp Allow

AMT – Land
AMT – Basis
AMT – Method
AMT - Period
AMT – Current Deprec

AMT – Prior Deprec
AMT – Override Current
Business Use Percent
Section 179 Property