

# 2021 1041 Federal E-filed Forms

## Form/Schedule

## E-file

## E-file Notes

1065 Schedule D (8865 only)

FinCEN Form 114: Report of Foreign Bank and Financial Accounts

✓

one per return

FinCEN Form 114a: Record of Authorization to Electronically File FBARs

✓

one per return

Form 1041: U.S. Income Tax Return for Estates and Trusts

✓

one per return

Form 1041-A: U.S. Information Return Trust Accumulation of Charitable Amounts

Form 1041-ES: Estimated Tax Payments

✓

4 installments per return

Form 1041-QFT: U.S. Income Tax Return for Qualified Funeral Trusts

Form 1041-T: Allocation of Estimated Tax Payments to Beneficiaries

Form 1042S: Foreign Person's U.S. Source Income Subject to Withholding

Form 1099-NEC: Nonemployee Compensation

Form 1116 (AMT): Recomputed Computation of Foreign Tax Credit for AMT

✓

10 per return

Form 1116: Foreign Tax Credit

✓

10 per return

Form 2210: Underpayment of Estimated Tax by Individuals, Estates, and Trusts

✓

one per return

Form 2439: Notice to Shareholder of Undistributed Long-Term Capital Gains

✓

Unlimited allowed per return

Form 2848: Power of Attorney and Declaration of Representative

Form 3468: Investment Credit

✓

one per return

Form 3468: Investment Credit (8865 only)

Form 3800: General Business Credit

✓

one per return

Form 4136: Credit for Federal Tax Paid on Fuels

✓

one per return

Form 4255: Recapture of Investment Credit

✓

one per return

Form 4562: Depreciation and Amortization

✓

Unlimited allowed per return

Form 461: Limitation on Business Losses

✓

One Per Return

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Form/Schedule	E-file	E-file Notes
Form 4684: Casualties and Thefts	✓	Unlimited allowed per return
Form 4797: Sales of Business Property	✓	One per return
Form 4952: Investment Interest Expense Deduction	✓	one per return
Form 4972: Tax on Lump Sum Distributions	✓	One per return
Form 5227: Split-Interest Trust Information Return		
Form 5471:- IRS Form 5471 - Information Return of U.S. Persons With Respect To Certain Foreign Corporations		
Form 56: Notice Concerning Fiduciary Relationship		
Form 5884: Work Opportunity Credit	✓	one per return
Form 6198: At-Risk Limitations	✓	Unlimited per return
Form 6198-AMT: At-Risk Limitations Recomputed for AMT	✓	Unlimited per return
Form 6252: Installment Sale Income	✓	Unlimited allowed per return
Form 6765: Credit for Increasing Research Activities	✓	one per return
Form 6781: Gains and Losses from Section 1256 Contracts and Straddles	✓	unlimited allowed per return
Form 7004: Application for Automatic Extension of Time to File	✓	One per return
Form 8453-FE: U.S. Estate or Trust Declaration for an IRS E-file Return	✓	One per return
Form 8582 AMT: Passive Activity Loss Limitations Recomputed for AMT	✓	One per return
Form 8582: Passive Activity Loss Limitations	✓	One per return
Form 8582-CR: Passive Activity Credit Limitations	✓	One Per Return
Form 8586: Low-Income Housing Credit	✓	one per return
Form 8621: Information Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund	✓	Unlimited allowed per return
Form 8801: Credit for Prior Year Minimum Tax - Individuals, Estates, and Trusts	✓	one per return

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Form 8824: Like-Kind Exchanges (8865 only)

Form 8825: Rental Real Estate Income and Expenses of a Partnership (8865 only)

Form 8838-P: Consent to Extend the Time to Assess Tax Pursuant to the Gain Deferral Method (Section 721(c)) (8865 only)

Form 8855: Election to Treat a Qualified Revocable Trust as Part of an Estate

Form 8858: Information Return of U.S. Persons with Respect to Foreign Disregarded Entities (8865 only)

Form 8865: Return of U.S. Persons with Respect to Certain Foreign Partnerships

Form 8865: Schedule G: Statement of Application of the Gain Deferral Method Under Section 721(c)

Form 8865: Schedule H: Acceleration Events and Exceptions Reporting Related to Gain Deferral Method under Section 721(c)

Form 8865: Schedule K-1: Partner's Share of Income, Deductions, Credits

Form 8865: Schedule O: Transfer of Property to a Foreign Partnership

Form 8865: Schedule P: Acquisitions, Dispositions, and Changes of Interest in a Foreign Partnership

Form 8868: Application for Extension of Time to File an Exempt Organization Return

✓

One per return

Form 8878-A: IRS E-file Electronic Funds Withdrawal Authorization for Form 7004

One per return

Form 8879-EO: IRS E-file Signature Authorization for an Exempt Organization

One per return

Form 8879-F: U.S. Estate or Trust Income Tax Declaration and Signature for Electronic Filing

One per return

Form 8886: Reportable Transaction Disclosure Statement

✓

Unlimited allowed per return

Form 8903: Domestic Production Activities Deduction

✓

One per return

Form 8938: Specified Foreign Financial Assets

✓

one per return

Form 8948: Preparer Explanation for Not Filing Electronically

One per return

Form 8949: Sales and Dispositions of Capital Assets

✓

One Per return

Form 8960: Net Investment Income Tax - Individuals, Estates, and Trusts

✓

One per return

# 2021 1041 Federal E-filed Forms

Form/Schedule	E-file	E-file Notes
Form 8990: Limitation on Business Interest Expense Under Section 163(j)	✓	Unlimited per return
Form 8990AMT: Limitation on Business Interest Expense Under Section 163(j)	✓	Unlimited Per return
Form 8992: U.S. Shareholder Calculation of Global Intangible Low-Taxed Income	✓	One Per return
Form 8995: Qualified Business Income Deduction Simplified Computation	✓	One per return
Form 8995-A: Qualified Business Income Deduction		
Form 8997: Initial and Annual Statement of Qualified Opportunity Fund Investment	✓	
Form 926: Return by a U.S. Transferor of Property to a Foreign Corporation	✓	One Per return
Form 965 Schedule F: Foreign Taxes Deemed Paid by Domestic Corporation	✓	Max 3 per return
Form 965 Schedule H: Amounts Reported on Forms 1116 and 1118 and Disallowed Foreign Taxes	✓	Max 3 per return
Form 965: Inclusion of Deferred Foreign Income Upon Transition to Participation Exemption System	✓	One Per return
Form 965-A: Individual Report of Net 965 Tax Liability	✓	One Per Return
Form3115:- IRS Form 3115 - Application for Change in Accounting Method		
Form5452:- IRS Form 5452 - Corporate Report of Nondividend Distributions		
Form970 -IRS Form 970 - Application to Use LIFO Inventory Method		
form982:- IRS Form 982 - Reduction of Tax Attributes Due to Discharge of Indebtedness (and Section 1082 Basis Adjustment)		
IRS1065ScheduleD:- IRS Form 1065 Schedule D - Capital Gains and Losses		
IRS1099R - IRS Form 1099R - Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.	✓	Unlimited per return
IRS2210F:- IRS Form 2210-F - Underpayment of Estimated Tax by Farmers and Fishermen		
IRS4970:- IRS Form 4970 - Tax on Accumulation Distribution of Trusts		
IRS5329:- IRS Form 5329 - Additional Taxes on Qualified Plans (Including IRAs) and Other Tax-Favored Accounts		

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IRS5471ScheduleJ:- IRS Form 5471 Schedule J - Accumulated Earnings and Profits (E&P) of Controlled Foreign Corporation

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Schedule A (Form 8995-A): Specified Service Trades or Businesses

Schedule B (Form 8995-A): Aggregation of Business Operations

Schedule C (1040): Profit or Loss from Business

✓

Unlimited per return

Schedule C (Form 8995-A): Loss Netting and Carryforward

Schedule D (Form 8995-A): Special Rules for Patrons of Agricultural or Horticultural Cooperatives

Schedule D AMT: Capital Gains and Losses Recomputed for AMT

Schedule D: Capital Gains and Losses

✓

one per return

Schedule E (1040): Supplemental Income and Loss

✓

One per return

Schedule F

✓

Max 4 per return

Schedule F (1040): Profit or Loss from Farming

✓

Unlimited per return

Schedule H (1040): Household Employment Taxes

✓

one per return

Schedule I: Alternative Minimum Tax - Estates and Trusts

✓

One per return

Schedule J: Accumulation Distribution for Certain Complex Trusts

✓

One per return

Schedule K-1: Beneficiary's Share of Income, Deductions, Credits, Etc.

✓

<999 for current app