

2024 K-1 Analyzer Import into 1065 from Partnerships

1065 Description	IRS Line	Organizer Description	Organizer EORG
Investment Name (Required)		Activity name	PTENAME
Entity Type (Required)			
Return ID			
Activity Number		Activity Number	PTESET
Ownership (T/S/J) (1040 output only)			
Tags (comma delineated)			
Tax Year Beginning (MM/DD/YYYY)			
Tax Year End (MM/DD/YYYY)			
K-1 Final?		Fully disposed of during the current year	PTEDISP
Amended K-1			
Partnership EIN (9 digits NO dashes)		Federal EIN	PTEID
Partnership Address			
Partnership City			
Partnership State			
Partnership Zip Code			
Partnership Foreign Province			
Partnership Foreign Postal Code			
Partnership Foreign Country			

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1065 Description	IRS Line	Organizer Description	Organizer EORG
Partnership Region			
IRS Center where partnership filed return			
Publicly traded partnership (PTP)		Publicly traded partnership	PTEPUBLIC
Partner's Identifying Number			
General partner or LLC member-manager			
Limited partner or other LLC member			
Domestic Partner			
Foreign Partner			
Disregarded Entity			
Disregarded Entity TIN			
Disregarded Entity Name			
What type of entity is this partner?			
Is this partner a retirement plan (IRA/SEP/Keogh/etc.) ?			
Beginning of the Year Profit Percentage			
End of the Year Profit Percentage			
Beginning of the Year Loss Percentage			
End of the Year Loss Percentage			

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1065 Description	IRS Line	Organizer Description	Organizer EORG
Beginning of the Year Capital Percentage			
End of the Year Capital Percentage			
Decrease is due to sale or exchange of partnership interest			
Nonrecourse			
Qualified nonrecourse financing			
Recourse			
Item K includes liability amounts from lower tier partnerships			
Beginning capital account			
Capital contributed during the year			
Current year net income (loss)			
Other increase (decrease)			
Withdrawals and Distributions			
Ending capital account			
Book Value			
Did the partner contribute property with a built-in gain or loss?			
Beginning Partner's Share of Net Unrecognized Section 704(c) Gain or (Loss)			

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1065 Description

IRS Line

Organizer Description

Organizer EORG

Ending Partner's Share of Net Unrecognized Section

704(c) Gain or (Loss)

Schedule K-3 is attached

More than one activity for at-risk purposes*

More than one activity for passive activity purposes*

Federal K-1

Ordinary business income

Line 1

Ordinary income (loss) from pass-through entities

PTEORDINC

Net rental real estate income (loss)

Line 2

Rental real estate income (loss) (Override)

PTERENTAL

Other net rental income (loss)

Line 3

Other rental income (loss)

PTEORENTAL

Guaranteed payments for services

Line 4a

Guaranteed payments services

X22.7087.168

Guaranteed payments for capital

Line 4b

Guaranteed payments capital

X22.7087.171

Total guaranteed payments

Line 4c

Interest Income description

Line 5

Interest income description

X22.7072.128

Interest Income

Line 5

Interest income

X22.7072.129

Ordinary dividends

Line 6a

Ordinary dividends (Override)

X22.7087.147

Qualified dividends description

Line 6b

Qualified dividends - included description

X22.7092.128

Qualified dividends

Line 6b

Qualified dividends - included in investment income

X22.7092.129

Dividend equivalents description

Line 6c

Dividend equivalents description

X22.7238.128

2024 K-1 Analyzer Import into 1065 from Partnerships

1065 Description	IRS Line	Organizer Description	Organizer EORG
Dividend equivalents	Line 6c	Dividend equivalents	X22.7238.129
Royalties description	Line 7	Royalty income description	X22.7074.128
Royalties	Line 7	Royalty income	X22.7074.129
Net short-term capital gain (loss)	Line 8	Short-term capital gain/loss	PTESTCAPITAL
Net long-term capital gain (loss)	Line 9a	Long-term capital gain/loss	PTELTCAPITAL
Collectibles (28%)	Line 9b	Collectibles (28%) gain (loss)	PTERLTCG
Unrecaptured section 1250 gain	Line 9c	Unrecaptured section 1250 gain (loss)	X22.7020.168
Net section 1231 gain (loss)	Line 10	Net Section 1231 gain (loss) (Override)	PTE1231
Other portfolio income (loss) description	Line 11A	Other portfolio income description	PTEPORTDESC
Other portfolio income (loss)	Line 11A	Other portfolio income	PTEPORTAMT
Involuntary conversions	Line 11B	Net involuntary conversion gain (loss) (Override)	PTECONV
Section 1256 contracts, straddles	Line 11C	Section 1256 gain/loss	X22.7016.172
Mining Exploration costs recapture	Line 11D	Mining exploration costs recapture	X22.7115.167
Cancellation of Debt	Line 11E	Cancellation of debt	X22.7115.170
Section 743(b) positive adjustments description	Line 11F	Section 743(b) positive adjustments description	X22.7252.129
Section 743(b) positive adjustments	Line 11F	Section 743(b) positive adjustments	X22.7252.130
Section 951(a) income inclusions	Line 11H	Income under subpart F (other than inclusions under 951A and 965)	X22.7087.165

2024 K-1 Analyzer Import into 1065 from Partnerships

1065 Description	IRS Line	Organizer Description	Organizer EORG
Gain (loss) from disposition of oil, gas, geothermal, or mineral properties (section 59(e))	Line 11I	Income from depletion properties	X22.7295.152
Recoveries of tax benefit items	Line 11J	Recoveries of tax benefit items	X22.7295.128
Gambling gains and losses	Line 11K	Gambling gains and losses.limited under 165d	X22.7295.131
Any income, gain, or loss to the partnership from a distribution under section 751(b) (certain distributions treated as sales or exchanges)	Line 11L	Income, gain or loss from distributions under 751b	X22.7295.134
Gain eligible for section 1045 rollover (replacement stock purchased by partnership)	Line 11M	Gain eligible for section 1045 rollover (stock purchased)	X22.7295.137
Gain eligible for section 1045 rollover (replacement stock not purchased by the partnership)	Line 11N	Gain eligible for section 1045 rollover (stock not purchased)	X22.7295.140
Sale or exchange of QSB stock with section 1202 exclusion	Line 11O	Gain from sale or exchange of QSB stock with 1202 exlusion	X22.7295.143
Gain or loss on disposition of farm recapture property and other items to which section 1252 applies	Line 11P	Gain/loss on dispositon of farm recapture property and 1252	X22.7295.146
Gain or loss on Fannie Mae or Freddie Mac qualified preferred stock	Line 11Q	Gain/loss Fannie Mae/Freddie Mac qualified preferred stock	X22.7295.149
Specially allocated ordinary gain (loss)	Line 11R	Net specially allocated Form 4797 ordinary gain (loss)	PTESPEC
Non-portfolio capital gain (loss)	Line 11S		
Other income description	Line 11ZZ	Other income description	PTEMISCIDESC
Other income	Line 11ZZ	Other income	PTEMISCIAMT

2024 K-1 Analyzer Import into 1065 from Partnerships

1065 Description	IRS Line	Organizer Description	Organizer EORG
Section 179 deduction	Line 12	Sec. 179 expense (treated as other than listed property)	PTE179
Cash contributions 60%	Line 13A	Cash contributions (60%)	PTEC50
Cash contributions 30%	Line 13B	Cash contributions (30%)	PTEC30
NonCash contributions 50%	Line 13C	Noncash contributions (50%)	PTEN50
NonCash contributions 30%	Line 13D	Noncash contributions (30%)	PTEN30
Capital gain property to a 50% organization (30%)	Line 13E	Capital gain property to a 50% org (30%)	PTEC20
Capital gain property (20%)	Line 13F	Capital gain property (20%)	PTEN20
Contributions 100%	Line 13G	Noncash contributions (100%) - Qual Conservation	PTEN100
Investment interest expense	Line 13H	Investment interest expense on investment debt	PTEINVINT
Deductions - royalty income	Line 13I	Deductions - royalty	X22.7143.128
Section 59(e)(2) expenditures description	Line 13J	Section 59(e)(2) expenditures description	PTE59EDESC
Section 59(e)(2) expenditures detail	Line 13J	Section 59(e)(2) expenditures	PTE59EAMT
Excess business interest expense	Line 13K	Excess business interest expense	X22.7019.163
Deductions - portfolio income (other) description	Line 13L	Deductions - portfolio (other) description	PTEPORTDDESC
Deductions - portfolio income (other)	Line 13L	Deductions - portfolio (other)	PTEPORTDAMT
Amounts paid for medical insurance	Line 13M	Amounts paid for medical insurance	X22.7143.131
Educational assistance benefits	Line 13N	Educational assistance benefits	X22.7143.134

2024 K-1 Analyzer Import into 1065 from Partnerships

1065 Description	IRS Line	Organizer Description	Organizer EORG
Dependent care benefits	Line 13O	Dependent care benefits	X22.7143.137
Preproductive period expenses	Line 13P	Preproductive period expenses	X22.7143.140
Pensions and IRAs	Line 13R	Pensions and IRAs	X22.7143.146
Reforestation expense deduction	Line 13S	Reforestation expense deduction	X22.7143.149
Section 743(b) negative adjustments	Line 13V	Section 743(b) negative adjustments	X22.7252.132
Soil and water conservation	Line 13W	Soil and water conservation	X22.7301.128
Film, television, and theatrical production expenditures	Line 13X	Film, television, and theatrical production expenditures	X22.7301.131
Expenditures for removal of barriers	Line 13Y	Expenditures for removal of barriers	X22.7301.134
Itemized deductions	Line 13Z	Itemized deductions	X22.7301.137
Contributions to a capital construction fund (CCF)	Line 13AA	Contributions to a capital construction fund (CCF)	X22.7301.140
Penalty on early withdrawal of savings	Line 13AB	Penalty on early withdrawal of savings	X22.7301.143
Interest expense allocated to debt-financed distributions	Line 13AC	Interest expense allocated to debt-financed distributions	X22.7301.146
Interest expense on working interest in oil or gas	Line 13AD	Interest expense on working interest in oil or gas	X22.7301.149
Deductions - portfolio income description	Line 13 AE	Deductions - portfolio income description	X22.7134.128
Deductions - portfolio income	Line 13 AE	Deductions - portfolio income	X22.7134.129
Other deductions description	Line 13ZZ	Other deductions description	PTEMISCDDDESC

2024 K-1 Analyzer Import into 1065 from Partnerships

1065 Description	IRS Line	Organizer Description	Organizer EORG
Other deductions	Line 13ZZ	Other deductions	PTEMISCDAMT
Net earnings (loss) from self-employment	Line 14A		
Gross farming or fishing income	Line 14B		
Gross non-farm income	Line 14C		
Zero-emission nuclear power production credit	Line 15A	Zero-emission nuclear power production	X22.7284.128
Credit for production from advanced nuclear power facilities	Line 15B	Production from advanced nuclear power facilities credit	X22.7284.131
Low-income housing credit (section 42(j)(5)) from post-2007 buildings	Line 15C	Low income housing credit (section 42(j)(5)) from post-2007 buildings	PTE42J5
Low-income housing credit (other) from post-2007 buildings	Line 15D	Low income housing credit (other) from post-2007 buildings	PTEO42J5
Qualified rehabilitation expenditures (rental real estate)	Line 15E	Qualified rehabilitation expenditures related to rental estate	PTEREHAB
Other rental real estate credits	Line 15F	Other rental real estate credits	PTERCREDIT
Other rental credits	Line 15G	Other rental credits	PTEORCR
Undistributed capital gains credit	Line 15H	Undistributed capital gains credit	X22.7114.143
Biofuel producer credit	Line 15I	Biofuel producer credit	CREAL
Work opportunity credit	Line 15J	Work opportunity credit	X22.7114.146
Disabled access credit	Line 15K	Disabled access credit	X22.7114.152
Empowerment zone employment credit	Line 15L	Empowerment zone employment credit	X22.7114.155

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1065 Description	IRS Line	Organizer Description	Organizer EORG
Credit for increasing research activities	Line 15M	Credit for increasing research activities	X22.7114.158
Credit for employer social security and Medicare taxes	Line 15N	Credit for employer social security & medicare taxes	EMSS
Backup withholding	Line 15O	Backup withholding	BWITH
Unused investment credit from the qualifying advanced coal project credit or qualifying gasification project credit allocated from cooperatives	Line 15P	Unused investment credit from the qualifying advanced coal project credit	X22.7284.134
Unused investment credit from the qualifying advanced energy project credit allocated from cooperatives	Line 15Q	Unused investment credit from the qualifying advanced energy project	X22.7284.137
Unused investment credit from the advanced manufacturing investment credit allocated from cooperatives	Line 15R	Unused investment credit from the advanced manufacturing investment	X22.7284.140
Unused investment credit from the clean electricity investment credit allocated from cooperatives	Line 15S	Unused investment credit from the clean electricity allocated from coop	X22.7319.140
Unused investment credit from the energy credit allocated from cooperatives	Line 15T	Unused investment credit from the energy credit allocated from coops	X22.7284.143
Unused investment credit from the rehabilitation credit allocated from cooperatives	Line 15U	Unused investment credit from the rehab credit allocated from coops	X22.7284.146
Advanced manufacturing production credit	Line 15V	Advanced manufacturing production credit	X22.7179.176
Clean hydrogen production credit	Line 15Y	Clean hydrogen production credit	X22.7284.152
Orphan drug credit	Line 15Z	Orphan drug credit	X22.7159.152
Enhanced oil recovery credit	Line 15AA	Enhanced oil recovery credit	X22.7159.164

2024 K-1 Analyzer Import into 1065 from Partnerships

1065 Description	IRS Line	Organizer Description	Organizer EORG
Renewable electricity production credit	Line 15AB	Renewable electricity production credit	X22.7159.167
Biodiesel, renewable diesel, or sustainable aviation fuels credit	Line 15AC	Sustainable aviation fuel credit	X22.7319.137
New markets credit	Line 15AD	New markets credit	NMKT
Credit for small employer pension plan startup costs	Line 15AE	Credit for small employer pension plan start up costs	X22.7159.158
Credit for small employer auto-enrollment	Line 15AF	Credit for small employer auto-enrollment credit	X22.7159.182
Credit for small employer military spouse retirement plan eligibility	Line 15AG	Credit for small employer military spouse retirement pan eligibility	X22.7284.158
Credit for employer-provided childcare facilities and services	Line 15AH	Credit for employer-provided child care facilities and services	X22.7159.161
Low sulfur diesel fuel production credit	Line 15AI	Low sulfur diesel fuel production credit	X22.7169.140
Qualified railroad track maintenance credit	Line 15AJ	Qualified railroad track maintenance credit	X22.7169.134
Credit for oil and gas production from marginal wells	Line 15AK	Credit for oil and gas production from marginal wells	X22.7169.131
Distilled spirits credit	Line 15AL	Distilled spirits credit	X22.7169.143
Energy efficient home credit	Line 15AM	Energy efficient home credit	X22.7169.146
Alternative fuel vehicle refueling property credit	Line 15AO	Alternative fuel vehicle refueling property credit	X22.7169.152
Clean renewable energy bond credit	Line 15AP	Clean renewable energy bond credit	X22.7284.161
New clean renewable energy bond credit	Line 15AQ	New clean renewable energy bond credit	X22.7284.164

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1065 Description	IRS Line	Organizer Description	Organizer EORG
Qualified energy conservation bond credit	Line 15AR	Qualified energy conservation bond credit	X22.7284.167
Qualified zone academy bond credit	Line 15AS	Qualified zone academy bond credit	X22.7284.170
Qualified school construction bond credit	Line 15AT	Qualified school construction bond credit	X22.7284.173
Build America bond credit	Line 15AU	Build America bond credit	X22.7169.155
Credit for employer differential wage payments	Line 15AV	Credit for employer differential wage payments	X22.7179.131
Carbon oxide sequestration credit	Line 15AW	Carbon oxide sequestration credit	X22.7169.173
Carbon oxide sequestration credit recapture	Line 15AX	Carbon oxide sequestration credit recapture	X22.7179.134
New clean vehicles credit	Line 15AY	Qualified plug-in electric drive motor vehicle credit	X22.7179.137
Qualified commercial clean vehicle credit	Line 15AZ	Qualified commercial clean vehicle credit	X22.7179.146
Credit for small employer health insurance premiums	Line 15BA	Credit for small employer health insurance premiums	X22.7179.143
Employer credit for paid family and medical leave	Line 15BB	Employer credit for paid family and medical leave	X22.7159.155
Eligible credits from transferor(s) under section 6418	Line 15BC	Eligible credits from transferor(s) under section 6418	X22.7284.179
Other credits description	Line 15ZZ	Other credits description	PTEOCRDESC
Other credits	Line 15ZZ	Other credits	PTEOCRAMT
Total foreign taxes paid	Line 21	Total foreign taxes paid (Choose one: either paid or accrued)	X22.7060.155
Post-1986 depreciation adjustment	Line 17A	Post-1986 depreciation adjustment (Override)	PTEDEPR

2024 K-1 Analyzer Import into 1065 from Partnerships

1065 Description	IRS Line	Organizer Description	Organizer EORG
Adjusted gain or loss	Line 17B	Adjusted gain (loss) (Override)	PTEBASIS
Depletion (other than oil & gas)	Line 17C	Depletion (other than oil and gas)	PTEDEPL
Oil, gas, & geothermal—gross income	Line 17D	Oil, gas and geothermal - gross income	PTEOIL
Oil, gas, & geothermal—deductions	Line 17E	Oil, gas and geothermal - deductions	PTEOILDED
Other AMT items description	Line 17F	Other AMT items description	PTEOPREFDESC
Other AMT items	Line 17F	Other AMT items	PTEOPREFAMT
Tax-exempt interest income description	Line 18A	Tax-exempt interest income description	X22.7075.128
Tax-exempt interest income	Line 18A	Tax-exempt interest income	X22.7075.129
Other tax-exempt income description	Line 18B	Other tax-exempt income description	X22.7076.128
Other tax-exempt income	Line 18B	Other tax-exempt income	X22.7076.129
Nondeductible expenses description	Line 18C	Nondeductible expenses description	X22.7077.128
Nondeductible expenses	Line 18C	Nondeductible expenses	X22.7077.129
Cash and marketable securities	Line 19A		
Distribution subject to section 737	Line 19B		
Other property	Line 19C		
Unrelated business taxable income	Line 20V	Unrelated business taxable income	X22.7115.164
Investment income	Line 20A	Investment income (Override)	PTEINVINC
Investment expenses	Line 20B	Investment expenses (Override)	PTEINVEXP

2024 K-1 Analyzer Import into 1065 from Partnerships

1065 Description	IRS Line	Organizer Description	Organizer EORG
Fuel tax credit information	Line 20C		
Qualified rehabilitation expenditures (other than rental real estate)	Line 20D	Qualified rehabilitation exp. related to rental estate(other than RRE)	X22.7114.161
Basis of energy property	Line 20E	Basis of energy property	X22.7114.164
Recapture of low-income housing credit (section 42(j)(5))	Line 20F	Recapture of low-income housing credit (section 42(j)(5)) (Override)	PTERECF
Recapture of low-income housing credit (other)	Line 20G	Recapture of low-income housing credit (other) (Override)	PTERECO
Recapture of investment credit	Line 20H	Recapture of investment credit	X22.7114.173
Recapture of other credits	Line 20I	Recapture of other credits	X22.7114.170
Look-back interest—completed long-term contracts	Line 20J	Look-back interest -- completed long-term contracts	X22.7115.146
Look-back interest—income forecast method	Line 20K	Look-back interest -- income forecast method	X22.7115.149
Dispositions of property with section 179 deductions	Line 20L		
Recapture of section 179 deduction	Line 20M	Recapture of section 179 deduction	X22.7159.128
Interest expense for corporate partners	Line 20N	Interest expense for corporate partners	X22.7159.131
Section 453(l)(3) information	Line 20O	Section 453(l)(3) information	X22.7115.152
Section 453A(c) information desc	Line 20P	Section 453A(c) information desc	X22.7279.128
Section 453A(c) information	Line 20P	Section 453A(c) information	X22.7279.129
Section 1260(b) information	Line 20Q	Section 1260(b) information	X22.7115.158

2024 K-1 Analyzer Import into 1065 from Partnerships

1065 Description	IRS Line	Organizer Description	Organizer EORG
Interest allocable to production expenditures	Line 20R	Interest allocable to production expenditures	X22.7159.134
CCF nonqualified withdrawals	Line 20S	CCF nonqualified withdrawals	X22.7159.137
Depletion information	Line 20T		
Cost Depletion	Line 20T1		
Percentage Depletion	Line 20T2		
Section 743(b) basis adjustment desc	Line 20U		X22.7264.129
Section 743(b) basis adjustment	Line 20U		X22.7264.130
Precontribution gain (loss)	Line 20W	Precontribution gain (loss)	X22.7115.173
Payment obligations including guarantees and deficit obligations (DROs)	Line 20X	Payment obligations including guarantees and deficit obligations (DROs)	X22.7311.128
Net Investment Income	Line 20Y	Net investment income	X22.7179.167
Section 199A income	Line 20Z	IRC § 199A Ordinary business income (loss) (Override)	X22.7262.128
Section 704(c) information	Line 20AA	IRC § 704(c) information	X22.7159.140
Section 751 gain(loss)	Line 20AB	IRC § 751 gain (loss)	X22.7159.149
Section 1(h)(5) collectibles gain	Line 20AC	IRC § 1(h)(5) gain (loss)	X22.7159.170
Section 1(h)(6) unrecaptured section 1250 gain	Line 20AD	Deemed IRC § 1250 unrecaptured gain	X22.7159.173

2024 K-1 Analyzer Import into 1065 from Partnerships

1065 Description	IRS Line	Organizer Description	Organizer EORG
Excess taxable income	Line 20AE	Excess taxable income	X22.7232.149
Excess business interest income	Line 20AF	Excess business interest income	X22.7232.152
Gross receipts for section 448(c)	Line 20AG	Gross receipts for section 448(c)	X22.7232.155
Noncash charitable contributions	Line 20AH	Noncash charitable contributions	X22.7311.131
Interest and tax on deferred compensation to partners	Line 20AI	Interest and tax on deferred compensation to partners	X22.7311.134
Excess business loss limitation	Line 20AJ	Excess business loss limitation	X22.7311.137
Gain from mark-to-market election	Line 20AK	Gain from mark-to-market election	X22.7311.140
Section 721(c) partnership	Line 20AL	Section 721(c) partnership	X22.7311.143
Section 1061 information	Line 20AM	Section 1061 information	X22.7311.146
Farming and fishing business	Line 20AN	Farming and fishing business	X22.7311.149
PTP information	Line 20AO	PTP information	X22.7311.152
Inversion gain	Line 20AP	Inversion gain	X22.7311.155

2024 K-1 Analyzer Import into 1065 from Partnerships

1065 Description	IRS Line	Organizer Description	Organizer EORG
Conservation reserve program payments	Line 20AQ	Conservation reserve program payments	X22.7179.158
IRA disclosure	Line 20AR		
Qualifying advanced coal project property and qualifying gasification project property	Line 20AS	Qualifying advanced coal project property and qualifying gasification project property	X22.7179.152
Qualifying advanced energy project property	Line 20AT	Qualifying advanced energy project property	X22.7179.164
Advanced manufacturing investment property	Line 20AU	Advanced manufacturing investment property	X22.7311.170
Reportable transactions	Line 20AW	Reportable transactions	X22.7311.176
Foreign partners, Form 8990, Schedule A	Line 20AY	Foreign partners, Form 8990, Schedule A	X22.7311.179
Other	Line 20ZZ		

2024 K-1 Analyzer Import into 1065 from S Corporations

1120S Description	IRS Line	Organizer Description	Organizer EORG
Investment Name (Required)		Activity name	PTENAME
Entity Type (Required)			
Return ID			
Activity Number		Activity Number	PTESET
Ownership (T/S/J) (1040 output only)			
Tags (comma delineated)			
Tax Year Beginning (MM/DD/YYYY)			
Tax Year End (MM/DD/YYYY)			
K-1 Final?		Fully disposed of during the current year	PTEDISP
Amended K-1			
Corporation EIN (9 digits NO dashes)		Federal EIN	PTEID
Corporation Address			
Corporation City			
Corporation State			
Corporation Zip Code			
Corporation Foreign Province			
Corporation Foreign Postal Code			
Corporation Foreign Country			

2024 K-1 Analyzer Import into 1065 from S Corporations

1120S Description

IRS Line

Organizer Description

Organizer EORG

Corporation Region

IRS Center where corporation filed return

Shareholder's Identifying Number

Shareholder's percentage of stock ownership for tax year

More than one activity for at-risk purposes*

More than one activity for passive activity purposes*

Federal K-1

Ordinary business income	Line 1	Ordinary income (loss) from pass-through entities	PTEORDINC
Net rental real estate income (loss)	Line 2	Rental real estate income (loss) (Override)	PTERENTAL
Other net rental income (loss)	Line 3	Other rental income (loss)	PTEORENTAL
Interest Income	Line 4	Interest income description	X22.7072.128
Interest Income	Line 4	Interest income	X22.7072.129
Ordinary dividends	Line 5a	Ordinary dividends (Override)	X22.7087.147
Qualified dividends	Line 5b	Qualified dividends - included description	X22.7092.128
Qualified dividends	Line 5b	Qualified dividends - included in investment income	X22.7092.129
Royalties	Line 6	Royalty income description	X22.7074.128
Royalties	Line 6	Royalty income	X22.7074.129

2024 K-1 Analyzer Import into 1065 from S Corporations

1120S Description	IRS Line	Organizer Description	Organizer EORG
Net short-term capital gain (loss)	Line 7	Short-term capital gain/loss	PTESTCAPITAL
Net long-term capital gain (loss)	Line 8a	Long-term capital gain/loss	PTELTCAPITAL
Collectibles (28%)	Line 8b	Collectibles (28%) gain (loss)	PTERLTCG
Unrecaptured section 1250 gain	Line 8c	Unrecaptured section 1250 gain (loss)	X22.7020.168
Net section 1231 gain (loss)	Line 9	Net Section 1231 gain (loss) (Override)	PTE1231
Other portfolio income(loss)	Line 10A	Other portfolio income description	PTEPORTDESC
Other portfolio income(loss)	Line 10A	Other portfolio income	PTEPORTAMT
Involuntary conversions	Line 10B	Net involuntary conversion gain (loss) (Override)	PTECONV
Section 1256 contracts, straddles	Line 10C	Section 1256 gain/loss	X22.7016.172
Mining exploration costs recapture	Line 10D	Mining exploration costs recapture	X22.7115.167
Section 951A(a) income	Line 10E	Section 951A income	X22.7021.165
Inclusions of subpart F income	Line 10F	Income under subpart F (other than inclusions under 951A and 965)	X22.7087.165
Section 951(a)(1)(B) inclusions	Line 10G		
Gain (loss) from Disposition of oil, gas, geothermal, or other mineral properties	Line 10I	Income from depletion properties	X22.7295.152
Recoveries of tax benefit items	Line 10J	Recoveries of tax benefit items	X22.7295.128
Gambling gains and losses	Line 10K	Gambling gains and losses.limited under 165d	X22.7295.131

2024 K-1 Analyzer Import into 1065 from S Corporations

1120S Description	IRS Line	Organizer Description	Organizer EORG
Gain eligible for section 1045 rollover (replacement stock purchased by the corporation)	Line 10M	Gain eligible for section 1045 rollover (stock purchased)	X22.7295.137
Gain eligible for section 1045 rollover (replacement stock not purchased by the corporation)	Line 10N	Gain eligible for section 1045 rollover (stock not purchased)	X22.7295.140
Sale or exchange of QSB stock with section 1202 exclusion	Line 10O	Gain from sale or exchange of QSB stock with 1202 exclusion	X22.7295.143
Non-portfolio capital gain (loss)	Line 10S		
Other income description	Line 10ZZ	Other income description	PTMISCIDESC
Other income	Line 10ZZ	Other income	PTMISCIAMT
Section 179 deduction	Line 11	Sec. 179 expense (treated as other than listed property)	PTE179
Cash contributions 60%	Line 12A	Cash contributions (60%)	PTEC50
Cash contributions 30%	Line 12B	Cash contributions (30%)	PTEC30
Noncash contributions 50%	Line 12C	Noncash contributions (50%)	PTEN50
Noncash contributions 30%	Line 12D	Noncash contributions (30%)	PTEN30
Capital gain property to a 50% organization (30%)	Line 12E	Capital gain property to a 50% org (30%)	PTEC20
Capital gain property (20%)	Line 12F	Capital gain property (20%)	PTEN20
Contributions 100%	Line 12G	Noncash contributions (100%) - Qual Conservation	PTEN100
Investment interest expense	Line 12H	Investment interest expense on investment debt	PTEINVINT
Deductions - royalty income	Line 12I	Deductions - royalty	X22.7143.128

2024 K-1 Analyzer Import into 1065 from S Corporations

1120S Description	IRS Line	Organizer Description	Organizer EORG
Section 59(e)(2) expenditures	Line 12J	Section 59(e)(2) expenditures description	PTE59EDESC
Section 59(e)(2) expenditures	Line 12J	Section 59(e)(2) expenditures	PTE59EAMT
Deductions portfolio income (other)	Line 12L	Deductions - portfolio (other) description	PTEPORTDDESC
Deductions portfolio income (other)	Line 12L	Deductions - portfolio (other)	PTEPORTDAMT
Preproductive period expenses	Line 12M	Preproductive period expenses	X22.7143.140
Reforestation expense deduction	Line 12O	Reforestation expense deduction	X22.7143.149
Soil and water conservation	Line 12W	Soil and water conservation	X22.7301.128
Film, television, and theatrical production expenditures	Line 12X	Film, television, and theatrical production expenditures	X22.7301.131
Expenditures for removal of barriers	Line 12Y	Expenditures for removal of barriers	X22.7301.134
Itemized deductions	Line 12Z	Itemized deductions	X22.7301.137
Contributions to a capital construction fund (CCF)	Line 12AA	Contributions to a capital construction fund (CCF)	X22.7301.140
Penalty on early withdrawal of savings	Line 12AB	Penalty on early withdrawal of savings	X22.7301.143
Interest expense allocated to debt financed distributions	Line 12AC	Interest expense allocated to debt-financed distributions	X22.7301.146
Other deductions description	Line 12ZZ	Other deductions description	PTEMISCDDDESC
Other deductions	Line 12ZZ	Other deductions	PTEMISC DAMT
Zero-emission nuclear power production credit	Line 13A	Zero-emission nuclear power production	X22.7284.128

2024 K-1 Analyzer Import into 1065 from S Corporations

1120S Description	IRS Line	Organizer Description	Organizer EORG
Credit for production from advanced nuclear power facilities	Line 13B	Production from advanced nuclear power facilities credit	X22.7284.131
Low-income housing credit (section 42(j)(5)) from post-2007 buildings	Line 13C	Low income housing credit (section 42(j)(5)) from post-2007 buildings	PTE42J5
Low-income housing credit (other) from post-2007 buildings	Line 13D	Low income housing credit (other) from post-2007 buildings	PTEO42J5
Qualified rehabilitation expenditures (rental real estate)	Line 13E	Qualified rehabilitation expenditures related to rental estate	PTEREHAB
Other rental real estate credits	Line 13F	Other rental real estate credits	PTERCREDIT
Other rental credits	Line 13G	Other rental credits	PTEORCR
Undistributed capital gains credit	Line 13H	Undistributed capital gains credit	X22.7114.143
Alcohol and cellulosic biofuel fuels credit	Line 13I	Biofuel producer credit	CREAL
Work opportunity credit	Line 13J	Work opportunity credit	X22.7114.146
Disabled access credit	Line 13K	Disabled access credit	X22.7114.152
Empowerment zone and renewal community employment credit	Line 13L	Empowerment zone employment credit	X22.7114.155
Credit for increasing research activities	Line 13M	Credit for increasing research activities	X22.7114.158
Credit for employer social security and Medicare taxes	Line 13N	Credit for employer social security & medicare	EMSS
Backup withholding	Line 13O	Backup withholding	BWITH

2024 K-1 Analyzer Import into 1065 from S Corporations

1120S Description	IRS Line	Organizer Description	Organizer EORG
Unused investment credit from the qualifying advanced coal project credit or qualifying gasification project credit allocated from cooperatives	Line 13P	Unused investment credit from the qualifying advanced coal project credit	X22.7284.134
Unused investment credit from the qualifying advanced energy project credit allocated from cooperatives	Line 13Q	Unused investment credit from the qualifying advanced energy project	X22.7284.137
Unused investment credit from the advanced manufacturing investment credit allocated from cooperatives	Line 13R	Unused investment credit from the advanced manufacturing investment	X22.7284.140
Unused investment credit from clean electricity investment credit allocated from cooperatives	Line 13S	Unused investment credit from the clean electricity allocated from coop	X22.7319.140
Unused investment credit from the energy credit allocated from cooperatives	Line 13T	Unused investment credit from the energy credit allocated from coops	X22.7284.143
Unused investment credit from the rehabilitation credit allocated from cooperatives	Line 13U	Unused investment credit from the rehab credit allocated from coops	X22.7284.146
Advanced manufacturing production credit	Line 13V	Advanced manufacturing production credit	X22.7179.176
Clean electricity production credit	Line 13W	Clean electricity production credit	X22.7319.143
Clean fuel production credit	Line 13X	Clean fuel production credit	X22.7319.146
Clean hydrogen production credit	Line 13Y	Clean hydrogen production credit	X22.7284.152
Orphan drug credit	Line 13Z	Orphan drug credit	X22.7159.152
Enhanced oil recovery credit	Line 13AA	Enhanced oil recovery credit	X22.7159.164
Renewable electricity production credit	Line 13AB	Renewable electricity production credit	X22.7159.167

2024 K-1 Analyzer Import into 1065 from S Corporations

1120S Description	IRS Line	Organizer Description	Organizer EORG
Biodiesel, renewable diesel, or sustainable aviation fuels credit	Line 13AC	Sustainable aviation fuel credit	X22.7319.137
New markets credit	Line 13AD	New markets credit	NMKT
Credit for small employer pension plan startup costs	Line 13AE	Credit for small employer pension plan start up costs	X22.7159.158
Credit for small employer auto-enrollment	Line 13AF	Credit for small employer auto-enrollment credit	X22.7159.182
Credit for military spouse participation	Line 13AG	Credit for small employer military spouse retirement pan eligibility	X22.7284.158
Credit for employer-provided childcare facilities and services	Line 13AH	Credit for employer-provided child care facilities and services	X22.7159.161
Low sulfur diesel fuel production credit	Line 13AI	Low sulfur diesel fuel production credit	X22.7169.140
Qualified railroad track maintenance credit	Line 13AJ	Qualified railroad track maintenance credit	X22.7169.134
Credit for oil and gas production from marginal wells	Line 13AK	Credit for oil and gas production from marginal wells	X22.7169.131
Distilled spirits credit	Line 13AL	Distilled spirits credit	X22.7169.143
Energy efficient home credit	Line 13AM	Energy efficient home credit	X22.7169.146
Alternative fuel vehicle refueling property credit	Line 13AO	Alternative fuel vehicle refueling property credit	X22.7169.152
Clean renewable energy bond credit	Line 13AP	Clean renewable energy bond credit	X22.7284.161
New clean renewable energy bond credit	Line 13AQ	New clean renewable energy bond credit	X22.7284.164
Qualified energy conservation bond credit	Line 13AR	Qualified energy conservation bond credit	X22.7284.167

2024 K-1 Analyzer Import into 1065 from S Corporations

1120S Description	IRS Line	Organizer Description	Organizer EORG
Qualified zone academy bond credit	Line 13AS	Qualified zone academy bond credit	X22.7284.170
Qualified school construction bond credit	Line 13AT	Qualified school construction bond credit	X22.7284.173
Build America bond credit	Line 13AU	Build America bond credit	X22.7169.155
Credit for employer differential wage payments	Line 13AV	Credit for employer differential wage payments	X22.7179.131
Carbon oxide sequestration credit	Line 13AW	Carbon oxide sequestration credit	X22.7169.173
Carbon oxide sequestration credit recapture	Line 13AX	Carbon oxide sequestration credit recapture	X22.7179.134
New clean vehicles credit	Line 13AY	Qualified plug-in electric drive motor vehicle credit	X22.7179.137
Qualified commercial clean vehicle credit	Line 13AZ	Qualified commercial clean vehicle credit	X22.7179.146
Credit for small employer health insurance premiums	Line 13BA	Credit for small employer health insurance premiums	X22.7179.143
Employer credit for paid family and medical leave	Line 13BB	Employer credit for paid family and medical leave	X22.7159.155
Transferred credits, section 6418	Line 13BC	Eligible credits from transferor(s) under section 6418	X22.7284.179
Other credits description	Line 13ZZ	Other credits description	PTEOCRDESC
Other credits	Line 13ZZ	Other credits	PTEOCRAMT
Total foreign taxes paid	Line 16F	Total foreign taxes paid (Choose one: either paid or accrued)	X22.7060.155
Total foreign taxes accrued	Line 14Q	Total foreign taxes accrued (Choose one: either paid or accrued)	
Post-1986 depreciation adjustment	Line 15A	Post-1986 depreciation adjustment (Override)	PTEDEPR

2024 K-1 Analyzer Import into 1065 from S Corporations

1120S Description	IRS Line	Organizer Description	Organizer EORG
Adjusted gain or loss	Line 15B	Adjusted gain (loss) (Override)	PTEBASIS
Depletion (other than oil & gas)	Line 15C	Depletion (other than oil and gas)	PTEDEPL
Oil, gas, & geothermal—gross income	Line 15D	Oil, gas and geothermal - gross income	PTEOIL
Oil, gas, & geothermal—deductions	Line 15E	Oil, gas and geothermal - deductions	PTEOILDED
Other AMT items	Line 15F	Other AMT items description	PTEOPREFDESC
Other AMT items	Line 15F	Other AMT items	PTEOPREFAMT
Tax-exempt interest income	Line 16A	Tax-exempt interest income description	X22.7075.128
Tax-exempt interest income	Line 16A	Tax-exempt interest income	X22.7075.129
Other tax-exempt income	Line 16B	Other tax-exempt income description	X22.7076.128
Other tax-exempt income	Line 16B	Other tax-exempt income	X22.7076.129
Nondeductible expenses	Line 16C	Nondeductible expenses description	X22.7077.128
Nondeductible expenses	Line 16C	Nondeductible expenses	X22.7077.129
Distributions	Line 16D		
Repayment of loans from shareholders	Line 16E		
Investment income	Line 17A	Investment income (Override)	PTEINVINC
Investment expenses	Line 17B	Investment expenses (Override)	PTEINVEXP
Qualified rehabilitation expenditures (other than rental real estate)	Line 17C	Qualified rehabilitation exp. related to rental estate(other than RRE)	X22.7114.161

2024 K-1 Analyzer Import into 1065 from S Corporations

1120S Description	IRS Line	Organizer Description	Organizer EORG
Basis of energy property	Line 17D	Basis of energy property	X22.7114.164
Recapture of low-income housing credit (section 42(j)(5))	Line 17E	Recapture of low-income housing credit (section 42(j)(5)) (Override)	PTERECF
Recapture of low-income housing credit (other)	Line 17F	Recapture of low-income housing credit (other) (Override)	PTERECO
Recapture of investment credit	Line 17G	Recapture of investment credit	X22.7114.173
Recapture of other credits	Line 17H	Recapture of other credits	X22.7114.170
Look-back interest—completed long-term contracts	Line 17I	Look-back interest -- completed long-term contracts	X22.7115.146
Look-back interest—income forecast method	Line 17J	Look-back interest -- income forecast method	X22.7115.149
Dispositions of property with section 179 deductions	Line 17K		
Recapture of section 179 deduction	Line 17L	Recapture of section 179 deduction	X22.7159.128
Section 453(l)(3) information	Line 17M	Section 453(l)(3) information	X22.7115.152
Section 453A(c) information	Line 17N	Section 453A(c) information desc	X22.7279.128
Section 453A(c) information	Line 17N	Section 453A(c) information	X22.7279.129
Section 1260(b) information	Line 17O	Section 1260(b) information	X22.7115.158
Interest allocable to production expenditures	Line 17P	Interest allocable to production expenditures	X22.7159.134
Capital construction fund (CCF) nonqualified withdrawals	Line 17Q	CCF nonqualified withdrawals	X22.7159.137
Depletion information	Line 17R		

2024 K-1 Analyzer Import into 1065 from S Corporations

1120S Description	IRS Line	Organizer Description	Organizer EORG
Net Investment Income	Line 17U	Net investment income	X22.7179.167
Section 199A information	Line 17V	IRC § 199A Ordinary business income (loss) (Override)	X22.7262.128
Excess taxable income	Line 17AA	Excess taxable income	X22.7232.149
Excess business interest income	Line 17AB	Excess business interest income	X22.7232.152
Gross Receipts for section 448(c)	Line 17AC	Gross receipts for section 448(c)	X22.7232.155
Excess business loss limitation	Line 17AJ	Excess business loss limitation	X22.7311.137
Farming and fishing income	Line 17AN	Farming and fishing business	X22.7311.149
Inversion gain	Line 17AP	Inversion gain	X22.7311.155
Qualifying advanced coal project property and qualifying gasification project property	Line 17AS	Qualifying advanced coal project property and qualifying gasification project property	X22.7179.152
Qualifying advanced energy project property	Line 17AT	Qualifying advanced energy project property	X22.7179.164
Advanced manufacturing investment property	Line 17AU	Advanced manufacturing investment property	X22.7311.170
Clean electricity investment property	Line 17AV		
Reportable transactions	Line 17AW	Reportable transactions	X22.7311.176
Other information	Line 17ZZ		

2024 K-1 Analyzer Import into 1065 from Trusts

1041 Description	IRS Line	Organizer Description	Organizer EORG
Investment Name (Required)		Activity name	PTENAME
Entity Type (Required)			
Return ID			
Activity Number		Activity Number	PTESET
Ownership (T/S/J) (1040 output only)			
Tags (comma delineated)			
Tax Year Beginning (MM/DD/YYYY)			
Tax Year End (MM/DD/YYYY)			
K-1 Final?		Fully disposed of during the current year	PTEDISP
Amended K-1			
Estate or trust's EIN (9 digits NO dashes)		Federal EIN	PTEID
Fiduciary's Address			
Fiduciary's City			
Fiduciary's State			
Fiduciary's Zip Code			
Fiduciary's Foreign Province			
Fiduciary's Foreign Postal Code			
Fiduciary's Foreign Country			

2024 K-1 Analyzer Import into 1065 from Trusts

1041 Description	IRS Line	Organizer Description	Organizer EORG
Fiduciary's Region			
Beneficiary's Identifying Number			
Domestic beneficiary			
Foreign beneficiary			
Check if Form 1041-T was filed and enter the date it was filed			
Check if this is the final Form 1041 for the estate or trust			
More than one activity for at-risk purposes*			
More than one activity for passive activity purposes*			
Federal K-1			
Ordinary business income	Line 6	Ordinary income (loss) from pass-through entities	PTEORDINC
Net rental real estate income	Line 7	Rental real estate income (loss) (Override)	PTERENTAL
Other rental income	Line 8	Other rental income (loss)	PTEORENTAL
Interest Income	Line 1	Interest income description	X22.7072.128
Interest Income	Line 1	Interest income	X22.7072.129
Ordinary dividends	Line 2a	Ordinary dividends (Override)	X22.7087.147
Qualified dividends	Line 2b	Qualified dividends - included description	X22.7092.128
Qualified dividends	Line 2b	Qualified dividends - included in investment income	X22.7092.129

2024 K-1 Analyzer Import into 1065 from Trusts

1041 Description	IRS Line	Organizer Description	Organizer EORG
Net short-term capital gain	Line 3	Short-term capital gain/loss	PTESTCAPITAL
Net long-term capital gain	Line 4a	Long-term capital gain/loss	PTELTCAPITAL
28% rate gain	Line 4b	Collectibles (28%) gain (loss)	PTERLTCG
Unrecaptured section 1250 gain	Line 4c	Unrecaptured section 1250 gain (loss)	X22.7020.168
Other portfolio and nonbusiness income	Line 5	Other portfolio income description	PTEPORTDESC
Other portfolio and nonbusiness income	Line 5	Other portfolio income	PTEPORTAMT
Depreciation	Line 9A		
Depletion	Line 9B		
Amortization	Line 9C		
Estate tax deduction	Line 10		
Excess deductions - Section 67(e) expenses	Line 11A		
Excess deductions - Non-miscellaneous itemized deductions	Line 11B		
Short-term capital loss carryover	Line 11C		
Long-term capital loss carryover	Line 11D		
Net operating loss carryover -- regular tax	Line 11E		
Net operating loss carryover -- minimum tax	Line 11F		
Gross farm and fishing income	Line 14F		

2024 K-1 Analyzer Import into 1065 from Trusts

1041 Description	IRS Line	Organizer Description	Organizer EORG
Zero-emission nuclear power production credit	Line 13T	Zero-emission nuclear power production	X22.7284.128
Credit for production from advanced nuclear power facilities	Line 13S	Production from advanced nuclear power facilities credit	X22.7284.131
Low-income housing credit	Line 13C	Low income housing credit (section 42(j)(5)) from post-2007 buildings	PTE42J5
Biofuel producer credit	Line 13H	Biofuel producer credit	CREAL
Work opportunity credit	Line 13F	Work opportunity credit	X22.7114.146
Empowerment zone employment credit	Line 13K	Empowerment zone employment credit	X22.7114.155
Credit for increasing research activities	Line 13I	Credit for increasing research activities	X22.7114.158
Credit for backup withholding	Line 13B	Backup withholding	BWITH
Advanced manufacturing production credit	Line 13D	Advanced manufacturing production credit	X22.7179.176
Clean electricity production credit	Line 13E	Clean electricity production credit	X22.7319.143
Clean fuel production credit	Line 13L	Clean fuel production credit	X22.7319.146
Orphan drug credit	Line 13M	Orphan drug credit	X22.7159.152
Renewable electricity production credit	Line 13J	Renewable electricity production credit	X22.7159.167
Credit for employer-provided child care facilities and services	Line 13N	Credit for employer-provided child care facilities and services	X22.7159.161
Credit for employer differential wage payments	Line 13Q	Credit for employer differential wage payments	X22.7179.131
Credit for small employer health insurance premiums	Line 13G	Credit for small employer health insurance premiums	X22.7179.143

2024 K-1 Analyzer Import into 1065 from Trusts

1041 Description	IRS Line	Organizer Description	Organizer EORG
Other credits description	Line 13ZZ	Other credits description	PTEOCRDESC
Other credits	Line 13ZZ	Other credits	PTEOCRAMT
Foreign taxes	Line 14B	Total foreign taxes paid (Choose one: either paid or accrued)	X22.7060.155
Adjustment for minimum tax purposes	Line 12A		
AMT adjustment attributable to qualified dividends	Line 12B		
Accelerated depreciation	Line 12G	Post-1986 depreciation adjustment (Override)	PTEDEPR
Depletion	Line 12H	Depletion (other than oil and gas)	PTEDEPL
Amortization	Line 12I		
Exclusion items	Line 12J		
AMT adjustment attributable to net short-term capital gain	Line 12C		
AMT adjustment attributable to net long-term capital gain	Line 12D		
AMT adjustment attributable to unrecaptured section 1250 gain	Line 12E		
AMT adjustment attributable to 28% rate gain	Line 12F		
Tax-exempt interest	Line 14A	Tax-exempt interest income description	X22.7075.128
Tax-exempt interest	Line 14A	Tax-exempt interest income	X22.7075.129
Net investment income	Line 14E	Investment income (Override)	PTEINVINC

2024 K-1 Analyzer Import into 1065 from Trusts

1041 Description	IRS Line	Organizer Description	Organizer EORG
Credit for estimated taxes	Line 13A		
Qualified rehabilitation expenditures	Line 14C	Qualified rehabilitation exp. related to rental estate(other than RRE)	X22.7114.161
Basis of energy property	Line 14D	Basis of energy property	X22.7114.164
Renewable electricity, refined coal, and Indian coal production credit	Line 13J		
Biodiesel and renewable diesel fuels credit	Line 13O	Biodiesel fuels credit	X22.7169.137
Credit to holders of tax credit bonds	Line 13P		
Recapture of credits	Line 13R	Recapture of other credits	X22.7114.170
Qualified business income, section 199A	Line 14I	IRC § 199A Ordinary business income (loss) (Override)	X22.7262.128
Qualifying advanced coal project property and qualifying gasification project property	Line 14J	Qualifying advanced coal project property and qualifying gasification project property	X22.7179.152
Qualifying advanced energy project property	Line 14K	Qualifying advanced energy project property	X22.7179.164
Advanced manufacturing investment property	Line 14L	Advanced manufacturing investment property	X22.7311.170
Clean electricity investment credit	Line 14M		
Other information	Line 14ZZ		