

Pass-Through Entity Elective Tax Calculation

Attach to Form 100S, Form 565, or Form 568.

Electing Qualified PTE Business name (as shown on tax return)

FEIN CA Corp no. CA SOS file no.

Part I Elective Tax

Table with 3 rows for Elective Tax calculation. Line 1: Total qualified net income... Line 2: Elective tax rate... Line 3: Multiply line 1 by line 2...

Part II Schedule of Qualified Taxpayers (SMLLCs, estates, and trusts, see instructions.)

(If there are more than seven qualified taxpayers, use Side 2 to continue. Do not attach Side 2 of the Schedule of Qualified Taxpayers, if blank.)

Table with 7 rows for Schedule of Qualified Taxpayers. Each row includes fields for First name, Initial, Last name, SSN or ITIN, FEIN, and sub-rows for pro-rata share and elective tax credit amount.

Electing Qualified PTE Name: _____

Electing Qualified PTE ID Number: _____

Schedule of Qualified Taxpayers

PRINT CLEARLY

(Qualified Taxpayer Information, continued from Side 1. **Do not** attach Side 2 of the Schedule of Qualified Taxpayers, if blank.)

8	First name <input type="radio"/>	Initial <input type="radio"/>	Last name <input type="radio"/>	<input type="checkbox"/> SSN or ITIN	<input type="checkbox"/> FEIN	
	a. Sum of pro-rata or distributive share and guaranteed payments included in qualified net income <input type="radio"/>			a		00
	b. Elective tax credit amount (Multiply box a by 9.3% and enter the result.). <input type="radio"/>			b		00
9	First name <input type="radio"/>	Initial <input type="radio"/>	Last name <input type="radio"/>	<input type="checkbox"/> SSN or ITIN	<input type="checkbox"/> FEIN	
	a. Sum of pro-rata or distributive share and guaranteed payments included in qualified net income <input type="radio"/>			a		00
	b. Elective tax credit amount (Multiply box a by 9.3% and enter the result.). <input type="radio"/>			b		00
10	First name <input type="radio"/>	Initial <input type="radio"/>	Last name <input type="radio"/>	<input type="checkbox"/> SSN or ITIN	<input type="checkbox"/> FEIN	
	a. Sum of pro-rata or distributive share and guaranteed payments included in qualified net income <input type="radio"/>			a		00
	b. Elective tax credit amount (Multiply box a by 9.3% and enter the result.). <input type="radio"/>			b		00
11	First name <input type="radio"/>	Initial <input type="radio"/>	Last name <input type="radio"/>	<input type="checkbox"/> SSN or ITIN	<input type="checkbox"/> FEIN	
	a. Sum of pro-rata or distributive share and guaranteed payments included in qualified net income <input type="radio"/>			a		00
	b. Elective tax credit amount (Multiply box a by 9.3% and enter the result.). <input type="radio"/>			b		00
12	First name <input type="radio"/>	Initial <input type="radio"/>	Last name <input type="radio"/>	<input type="checkbox"/> SSN or ITIN	<input type="checkbox"/> FEIN	
	a. Sum of pro-rata or distributive share and guaranteed payments included in qualified net income <input type="radio"/>			a		00
	b. Elective tax credit amount (Multiply box a by 9.3% and enter the result.). <input type="radio"/>			b		00
13	First name <input type="radio"/>	Initial <input type="radio"/>	Last name <input type="radio"/>	<input type="checkbox"/> SSN or ITIN	<input type="checkbox"/> FEIN	
	a. Sum of pro-rata or distributive share and guaranteed payments included in qualified net income <input type="radio"/>			a		00
	b. Elective tax credit amount (Multiply box a by 9.3% and enter the result.). <input type="radio"/>			b		00
14	First name <input type="radio"/>	Initial <input type="radio"/>	Last name <input type="radio"/>	<input type="checkbox"/> SSN or ITIN	<input type="checkbox"/> FEIN	
	a. Sum of pro-rata or distributive share and guaranteed payments included in qualified net income <input type="radio"/>			a		00
	b. Elective tax credit amount (Multiply box a by 9.3% and enter the result.). <input type="radio"/>			b		00
15	First name <input type="radio"/>	Initial <input type="radio"/>	Last name <input type="radio"/>	<input type="checkbox"/> SSN or ITIN	<input type="checkbox"/> FEIN	
	a. Sum of pro-rata or distributive share and guaranteed payments included in qualified net income <input type="radio"/>			a		00
	b. Elective tax credit amount (Multiply box a by 9.3% and enter the result.). <input type="radio"/>			b		00
16	First name <input type="radio"/>	Initial <input type="radio"/>	Last name <input type="radio"/>	<input type="checkbox"/> SSN or ITIN	<input type="checkbox"/> FEIN	
	a. Sum of pro-rata or distributive share and guaranteed payments included in qualified net income <input type="radio"/>			a		00
	b. Elective tax credit amount (Multiply box a by 9.3% and enter the result.). <input type="radio"/>			b		00