

# Tax-Option (S) Corporation Shareholder's Share of Income, Deductions, Credits, etc.

Wisconsin Department  
of Revenue

For 2013 or taxable year beginning \_\_\_\_\_, 2013, and ending \_\_\_\_\_, 20\_\_\_\_

<b>Part I</b> Information About the Corporation	<b>Part II</b> Information About the Shareholder
<b>A</b> Corporation's federal employer ID number	<b>C</b> Shareholder's identifying number
<b>B</b> Corporation's name, address, city, state, and ZIP code	<b>D</b> Shareholder's name, address, city, state, and ZIP code

- E** Shareholder's percentage of stock ownership for taxable year . . . . . \_\_\_\_\_ %
- F** Shareholder's state of residence (if a full-year Wisconsin resident, items G, H, and I do not apply) . . . . . \_\_\_\_\_
- G**  Check if shareholder's Wisconsin amount is determined by apportionment. Apportionment percentage . . . . . \_\_\_\_\_ %
- H**  Check if shareholder's Wisconsin amount is determined by separate accounting.
- I**  Check if shareholder is a nonresident and filed Form PW-2 to opt out of pass-through entity withholding.
- J** Entity of shareholder:  Individual  Estate  Trust  Exempt organization  Other \_\_\_\_\_
- K** (Optional) If known that this shareholder is a disregarded entity or grantor trust, enter the name and identifying number of the taxpayer to whom this income will be reported: \_\_\_\_\_
- L** Check applicable schedule:  **Final 5K-1**  **Amended 5K-1**

<b>Part III</b> Shareholder's Share of Current Year Income, Deductions, Credits, and Other Items					
	(a) Pro rata share items	(b) Federal amount	(c) Adjustment	(d) Amount under Wis. law	(e) Wis. source amount <i>(see instructions)</i>
<b>1</b>	Ordinary business income (loss) . . . . .				
<b>2</b>	Net rental real estate income (loss) . . . . .				
<b>3</b>	Other net rental income (loss) . . . . .				
<b>4</b>	Interest income . . . . .				
<b>5</b>	Ordinary dividends . . . . .				
<b>6</b>	Royalties . . . . .				
<b>7</b>	Net short-term capital gain (loss) . . . . .				
<b>8</b>	Net long-term capital gain (loss) . . . . .				
<b>9a</b>	Net section 1231 gain (loss) . . . . .				
<b>9b</b>	Portion of the amount on line 9a attributable to gains on sales of farm assets . . . . .				
<b>10</b>	Other income (loss) <i>(list)</i> : _____ _____ _____				
<b>11</b>	Section 179 deduction . . . . .				
<b>12</b>	Other deductions <i>(list)</i> : _____ _____ _____ _____ _____ _____ _____				

(a) Pro rata share items	(b) Federal amount	(c) Adjustment	(d) Amount under Wis. law	(e) Wis. source amount (see instructions)	
<b>Credits:</b>					
<b>13 a</b> Schedule _____					
<b>b</b> Schedule _____					
<b>c</b> Schedule _____					
<b>d</b> Schedule _____					
<b>e</b> Schedule _____					
<b>f</b> Schedule _____					
<b>g</b> Schedule _____					
<b>h</b> Schedule _____					
<b>i</b> Schedule _____					
<b>j</b> Schedule _____					
<b>k</b> Schedule _____					
<b>l</b> Schedule _____					
<b>m</b> Schedule _____					
<b>n</b> Schedule _____					
<b>o</b> Tax paid to other states <b>(1)</b> _____ <b>(2)</b> _____ <b>(3)</b> _____					
<b>p</b> Wisconsin tax withheld .....					
<b>14</b> Foreign transactions ( <i>list</i> ):					
_____					
_____					
<b>15</b> Alternative minimum tax (AMT) items ( <i>list</i> ):					
_____					
_____					
<b>16 a</b> Tax-exempt interest income .....					
<b>b</b> Other tax-exempt income .....					
<b>c</b> Nondeductible expenses .....					
<b>d</b> Property distributions .....					
<b>e</b> Repayment of loans from shareholders .....					
<b>17 a</b> Investment income .....					
<b>b</b> Investment expenses .....					
<b>c</b> Dividend distributions paid from accumulated earnings and profits .....					
<b>d</b> Other items and amounts ( <i>list</i> ):					
_____					
<b>18 a</b> Related entity expense addback .....					
<b>b</b> Related entity expense allowable .....					
<b>19</b> Income (loss) reconciliation .....					
<b>20</b> Gross income (before deducting expenses) from all activities .....					