

Guide Series

TAX FORMS: FEDERAL AND STATE

The following is a selected list of the sources for commonly requested personal income tax forms. Most of the tax forms are located in the Tax Collection or the Reserve Room. The staff of the Legal Research Center can help you locate a particular book of forms, but cannot select which form you need to file.

FEDERAL TAX FORMS:

1. *Reproducible Federal Tax Forms for Use in Libraries* Reserve KF 6369.U554
2. *Package X: Informational Copies of Federal Tax Forms* Reserve KF 6369.U55
3. *Tax Management I.R.S. Forms* KF 6335 .A65 T38
4. *Tax Action Coordinator* KF 6285 .R48
5. *Annotated Tax Forms* KF 6366 .R6

Available on the internet: www.sandiego.edu/lrc

CALIFORNIA TAX FORMS:

1. California Forms 540, 540A, etc. (during tax season only)
2. *California Package X Taxforms Catalog* Reserve KFC 863 .A65
3. *Spidell's California Tax Forms and Instructions* Reserve KFC 860 .A65 S754

I.R.S. PUBLICATIONS:

1. *A Selection of 1982 Internal Revenue Service Tax Information Publications* KF 6369 .U572
2. *RIA's Official I.R.S. Publications* KF 6301 .A6 R5

Available on the internet: www.sandiego.edu/lrc

FEDERAL TAX FORMS:

Reproducible Federal Tax Forms for Use in Libraries is an I.R.S. publication kept in the Reserve Room at call number KF 6369 .U554. This set contains Forms 1040, 1040A, 1040EZ, and many others. These forms are available for photocopying.

Package X: Informational Copies of Federal Tax Forms, also published by the I.R.S., is located in the Reserve Room at call number KF 6369 .U55. This two volume set is self-described as the "primary reference document for tax practitioners and contains most major tax forms and publications." As indicated by the call number, this set is physically located next to the *Reproducible Federal Tax Forms*.

The Legal Research Center has several privately published tax form services. The *Tax Management I.R.S. Forms*, is a looseleaf multi-volume set, published by the Bureau of National Affairs, available in the Tax Collection at KF 6335 .A65 T3. The *Tax Action Coordinator*, in the Tax Collection at KF 6285L .R48, is prepared by the Research Institute of America, Inc. The *Tax Action Coordinator* has tax returns and forms filled-in and explained, as well as tax planning tables. *Annotated Tax Forms*, is in the Tax Collection at KF 6366 .R6.

Forms may also be ordered directly from the I.R.S. at (800) 829-2765.

CALIFORNIA TAX FORMS:

California forms may be picked up in the Information Services area during the regular tax season, for as long as the supplies last. The LRC has California Forms 540, 540A, 540NR, and 3502.

The Legal Research Center has the *California Package X*, published by the State of California Franchise Tax Board. The *California Package X* is in the Reserve Room at call number KFC 863 .A65. *California Package X* lists Franchise Tax Board tax assistance addresses and phone numbers, has a table of contents and a subject index for locating which form you need.

Spidell's California Tax Forms and Instructions is in the Reserve Room at KFC 860 .A65 S754. *Spidell's* describes itself as being complete with all of the current tax forms and instructions that are needed to prepare most individual, partnership, corporation, fiduciary, gift and inheritance, payroll, and sales tax returns to be filed with the State of California.

California tax forms can also be ordered directly from the Franchise Tax Board at (800) 338-0505.

TAX FORMS - STATES OTHER THAN CALIFORNIA:

State Income Taxes (KF 6752 .A6 P7) includes corporate and personal income tax laws and regulations. Includes some forms.

CONTACT A REFERENCE LIBRARIAN FOR FURTHER ASSISTANCE