



Form 355U
Excise for Taxpayers
Subject to Combined Reporting

2018
Massachusetts
Department of
Revenue

For calendar year 2018 or taxable period beginning 2018 and ending
Name of principal reporting corporation Federal Identification number
Principal address City/Town State Zip
Contact person Telephone number

- 1 Type of group (check one only): [] Financial [] Non-financial [] Mixed
2 Are you making or are you subject to an affiliated group or worldwide election? [] Affiliated group [] Worldwide [] Neither
3 Check if an affiliated group or worldwide election applies, and if so, that it is a new election for the current year []
4 Check if any member of the group is requesting alternate apportionment []
5 Check if an amended filing [] If Yes, check if federal amendment [] Check if federal audit []
6 Check if group or any member is deducting interest expense paid to a related entity []
7 Check if group or any member is deducting intangible expense paid to a related entity []
8 Check if group has an excluded parent []
9 Check if group has elected a Massachusetts adjusted basis for non-taxable members []
10 Check if any member is currently under audit by the Internal Revenue Service (IRS) []
11 Check if any member is taking a Massachusetts film credit against its excise tax []
12 Check if any member is taking a life science credit against its excise tax []

Table with 2 columns: Description and Line Number. Rows 13-20: 13 Last year for which any member was audited by IRS... 14 Enter the number of federal disclosure statements... 15 Enter the number of Massachusetts taxpayer disclosure statements... 16 Total number of taxable members... 17 Number of members subject to non-income measure only... 18 Number of non-taxable members... 19 Number of U.S. Schedules M-3 filed... 20 Number of U.S. Forms 5471 filed by members...

Excise Tax Calculation

Table with 2 columns: Description and Line Number. Rows 21-43: 21 Total financial institution excise due from members... 22 Reserved... 23 Total business corporation measure of excise due from members... 24 Total excise before credits and payments... 25 Credits taken by corporations using their own credits... 26 Credits taken under sharing rules... 27 Excise due before voluntary contribution... 28 Voluntary contribution for endangered wildlife conservation... 29 Excise due plus voluntary contribution... 30 2017 overpayment applied to 2018 tax... 31 Estimated tax payments (group)... 32 Payment with extension (group)... 33 Pass-through entity withholding... 34 Total refundable credits... 35 Other payment or refund for this tax year... 36 Total payments for the combined group... 37 Amount overpaid... 38 Amount overpaid to be credited to 2019 estimated tax... 39 Amount overpaid to be refunded... 40 Balance due... 41 M-2220 penalty... Other penalties... Total penalty... 42 Interest... 43 Excise due plus statutory additions...