



Note: This form contains information necessary to create a PTE account with the Department. If you are a first-time Ohio PTE filer, this form must accompany your first estimated payment and UPC voucher. This form is not required if your first contact with the Department is filing a PTE return (IT 4708, IT 4738, IT 1041, or IT 1140); since these returns contain the same information to create the PTE account.

Form with fields: Federal Employer Identification Number (FEIN) (Required. "Applied for" is not acceptable), SSN of Decedent (estates only), Name, Address, city, state and ZIP code, Foreign Address (if applicable), Foreign Country Code (if applicable)

Type of Organization: (check the one box that applies)

- Checkboxes for S Corp, LLC, Partnership, Trust (Simple, Resident, Irrevocable, Testamentary, Complex, Nonresident), Estate, Bankruptcy, Decedent, and Other.

I intend to File the Following Forms (check all that apply):

- Checkboxes for Fiduciary Income Tax Trust, Fiduciary Income Tax Estate, Pass-Through Entity & Trust Withholding Tax, Pass-Through Entity Composite Income Tax, and Electing Pass-Through Entity Income Tax.

Date of first operations in Ohio: _____ NAICS code: _____

Financial year begin date: _____ Financial year end date: _____

Contact Information:

Table with 5 columns: Name, Title, Phone#, Email, Date

If you have never filed a PTE return, but have already made your first estimated payment, please submit this form to one of the methods below as soon as possible:

Online Notice Response Service: tax.ohio.gov - Contact Us -or- gateway.ohio.gov

eFax: (206) 984-1685 Email: pass-throughentity@tax.state.oh.us

Mail: Ohio Department of Taxation Pass-Through Entity & Fiduciary Income Tax Division P.O. Box 2476 Columbus, OH 43216-2476