

New York State Department of Taxation and Finance

## Itemized Deduction, and Other Taxes and Tax Credits Attachment to Form IT-201

**IT-201-ATT** 

| See Instructions for Form IT-201-ATT on pages 33 through 38 of your Form IT-201 instructions booklet (IT-201-I or IT-2) | 11-P) for assistance. |
|---|-----------------------|
|---|-----------------------|

| Name(s) as shown on Form IT-201 | Your | Your social security number |   |  |   |   |   |  |
|---------------------------------|------|-----------------------------|---|--|---|---|---|--|
|                                 |      |                             | - |  | - | - |   |  |
|                                 | _    | -                           | - |  |   |   | - |  |

- If you claim the New York itemized deduction on line 32 of your Form IT-201, you must complete Part I below and attach this Form IT-201-ATT to your return.
- Complete all parts that apply.
- Attach this Form IT-201-ATT, and any other forms that apply, to your Form IT-201.

| Pa       | rt I —  | Ne  | w York State Itemized Deduction (see page 33)  |     |          |              | Doll | ars          |                      |               | Cen                                     | nts    |
|----------|---------|-----|--|-----|----------|--------------|------|--------------|----------------------|---------------|---|--------|
|          |         | 1   | Medical and dental expenses (from federal Schedule A, line 4)  | 1.  |          |              |      |              |                      |               | ,                                       |        |
|          |         | 2   | Taxes you paid (from federal Schedule A, line 9)   | 2.  |          |              |      | _ į_         |                      |               | ,                                       |        |
|          |         | 3   | Interest you paid (from federal Schedule A, line 14)   | 3.  |          | _ į́_        |      | _į_          |                      |               | ,                                       |        |
|          |         | 4   | Gifts to charity (from federal Schedule A, line 18)  | 4.  |          | _ į́_        |      | _ į́_        |                      |               | ,                                       |        |
|          |         | 5   | Casualty and theft losses (from federal Schedule A, line 19)   | 5.  |          | _ į́_        |      | _ į́_        |                      |               | ,                                       |        |
|          |         | 6   | Job expenses and most other miscellaneous deductions (from federal Schedule A, line 26)  | 6.  |          | _ į́_        |      | _ į́_        |                      |               | ,                                       |        |
|          |         | 7   | Other miscellaneous deductions (from federal Schedule A, line 27)  | 7.  |          | _ į́_        |      | _ į́_        |                      |               | ,                                       |        |
|          |         |     |  |     |          |              |      |              |                      |               |   |        |
|          |         | 8   | Total itemized deductions (from federal Schedule A, line 28)   | 8.  |          | _ ¦_         |      | _ ;_         |                      | •             | ,                                       |        |
|          |         | 9   | State, local, and foreign income taxes and other subtraction adjustments (see page 33)   | 9.  |          | _ į _        |      | _ į_         |                      |               | ,                                       |        |
|          |         | 10  | Subtract line 9 from line 8  | 10. |          | _ j          |      | _ ;_         |                      | •             | ,                                       |        |
|          |         | 11  | Addition adjustments (see page 34)   | 11. |          | _;_          |      | _;_          |                      |               | ,                                       |        |
|          |         |     |  |     |          |              |      |              |                      |               |   |        |
|          |         | 12  |  | 12. | Ш        | _ ;_         |      | , _          | $\perp \!\!\! \perp$ | _ •           | · 📖                                     | ш      |
|          |         | 13  | Itemized deduction adjustment (see page 34)  | 13. | Ш        | _ ;_         |      | _;_          | Ш                    | <u></u> .     | ,                                       | Щ      |
|          |         | 14  | Subtract line 13 from line 12. This is your New York State itemized deduction.   |     |          |              | , ,  |              |                      |               |   |        |
|          |         |     | (Enter here and on Form IT-201, line 32. Attach this form to your Form IT-201.)  | 14. |          | _ ;_         |      | _,-          | Ш                    | •             |   |        |
| Pa       | rt II – | - O | ther New York State Taxes (see page 35)  |     |          |              |      |              |                      |               |   |        |
|          |         |     | <u> </u>   |     |          |              |      |              |                      |               |   |        |
| 15       |         |     | te tax on capital gain portion of lump-sum distributions   |     | П        | <u> </u>     | 1 1  |              |                      | $\overline{}$ | т т                                     |        |
|          |         |     | T-230; attach form)  | 15. | $\vdash$ | _ <u>;</u> _ |      |              | +                    | •             | '-                                      |        |
|          |         |     | nvestment credit on early dispositions (from Form IT-212; attach form)   | 16. | Ш        | _ ;_         |      | ;-           |                      | •             | Ш                                       |        |
| 17       |         |     | inancial services industry investment credit on early dispositions   | 47  | П        |              | 1 1  |              | $\neg \neg$          | $\neg$        | Т                                       |        |
| 40       |         |     | F-252; attach form)  | 17. | Ш        | _ ;_         |      | <u> </u>     |                      | •             | Ш                                       | _      |
| 18       |         |     | inancial services industry EDZ investment tax credit and EDZ employment  | 18. |          |              |      |              | $\Box$               | $\neg$        | ТТ                                      |        |
| 40       |         |     | edit on early dispositions (from Form DTF-605; attach form)  | 10. |          | _,_          |      |              |                      | •             | <u>.    </u>                            | _      |
| 19       |         |     | EDZ capital tax credit, EDZ investment tax credit, and EDZ employment incentive  | 19. |          |              |      |              | $\top$               | $\neg$        | ТТ                                      |        |
| 20       |         |     | arly dispositions (total from Form DTF-602 or Form DTF-603, or both; attach forms that apply)  | 20. | H        | — į –        |      | — <u>;</u> – | +                    | ┥.            |   | =      |
| 20       |         |     | esident credit for taxes paid to a province of Canada (from Form IT-112-R; attach form)  armers' school tax credit on converted property (from Form IT-217; attach form) | 21. | H        | — į –        |      | — <u>i</u> – | +                    | ⊢'            |   |        |
| 21<br>22 |         |     | through 21   | 22. |          | <b>- ز</b> - |      | — i-         | +                    | <b>⊣</b> •    | +                                       |        |
| 23       |         |     | Form IT-201, line 39. 23. 23.  |     |          | _,_          |      | ,_           |                      |               |   |        |
| 24       |         |     | Form IT-201, line 38   | Ī   |          |              |      |              |                      |               |   |        |
| 25       |         |     | 24 from line 23 (if line 24 is more than line 23, leave blank)   | 25. |          |              |      |              | П                    | T             | T                                       |        |
|          |         |     | 25 from line 22 (if line 25 is more than line 22, leave blank)   | 26. | П        | — ; —        |      | - ¡ -        | $\top$               | ٦.            | Ħ                                       | П      |
|          |         |     | te separate tax on lump-sum distributions  |     |          | _,_          |      | ,_           |                      |               | لــــــــــــــــــــــــــــــــــــــ |        |
|          |         |     | F-230: attach form)  |     |          |              |      |              |                      |               |   |        |
| 28       | ,       |     | it against separate tax on lump-sum distributions  |     |          |              |      |              |                      |               |   |        |
|          |         |     | T-112.1; attach form and a copy of the return filed with   |     |          |              |      |              |                      |               |   |        |
|          |         |     | e or province of Canada)   |     |          |              |      |              |                      |               |   |        |
| 29       |         |     | 28 from line 27  | 29. |          |              |      | Ţ            |                      | Π,            | $\prod$                                 | $\Box$ |
| 30       |         |     | te minimum income tax (from Form IT-220; attach form)  | 30. |          | _ <u>;</u> _ |      | _;-<br>!     | $\top$               |               | . 🗖                                     |        |
|          |         |     | 29, and 30. This is your Net other New York State taxes.   |     |          | _,_          |      | ,_           |                      |               |   | $\neg$ |
|          |         |     | amount here and on Form IT-201, line 41  | 31. |          |              |      |              |                      |               | ,                                       | П      |
|          |         |     | ·  | •   |          | _,_          |      | ,_           | inua                 | d 0.          | . 60                                    | -de)   |

| Pa  | rt III — C                       | Other City of New York Taxes (see page 35)  |     |   |   | Dolla    | ars           |   |  | Се                | nts      |
|-----|----------------------------------|---|-----|---|---|----------|---------------|---|--|-------------------|----------|
| 32  | Part-year city                   | of New York resident tax (from Form IT-360.1, attach form)  | 32. |   |   |          | Ţ             |   |  | $\cdot $          |          |
| 33  |                                  | ork minimum income tax (from Form IT-220, attach form)  | 33. |   | 1_  |          | _ [_          |   |  | •                 |          |
| 34  | Full-year city                   | of New York resident separate tax on lump-sum distributions   |     |   |   |          |               |   |  |                   |          |
|     | (from Form I                     | T-230; attach form) Part-year city of New York residents, see page 36                               | 34. |   |   |          | _  <br>;_     |   |  | •_                |          |
| 35  | Full-year city of                | New York tax on capital gain portion of lump-sum distributions (from Form IT-230; attach form)      | 35. |   | <u>.</u>                                      |          | _ į.          |   |  | •                 |          |
| 36  | Total other c                    | ity of New York taxes (add lines 32 through 35; enter here and on Form IT-201, line 46)             | 36. |   | .j  |          | _ į́_         |   |  |                   |          |
| _   |                                  |   |     |   |   |          |               |   |  |                   |          |
| Pa  | rt IV — C                        | Other Tax Credits (see page 36; attach all applicable forms)  |     |   |   |          |               |   |  |                   |          |
| _   | -                                | able credits — Sections A, B, and C   |     |   |   |          |               |   |  |                   |          |
|     |                                  | ew York State non-carryover credits (see page 36)   |     |   |   |          |               |   |  |                   |          |
| 37  |                                  | lit (from Form IT-112-R; attach form and a copy of the return filed with the other state or Canada) | 37. |   | Ţ   |          |               |   |  | •                 |          |
| 38  | Accumulation                     | distribution credit (attach computation)  | 38. |   | <u>.</u> j                                    |          | í<br>– • –    |   |  | •                 |          |
| Sec | ction B — N                      | ew York State carryover credits (see page 36)   |     |   | ,   |          |               | ı |  |                   |          |
| 39  | Solar electric                   | generating equipment credit (from Form IT-255, line 11)   | 39. |   | ļ   |          | <u>,</u>      |   | $\perp$  | <u>.</u>          | Ш        |
| 40  | Investment cr                    | edit (from Form IT-212)   | 40. |   | ]<br>- <b>,</b> —                             |          | _ ]<br>;-     |   | $\perp$  | ∙∟                |          |
| 41  | Financial ser                    | rvices industry investment credit (from Form IT-252)  | 41. |   |   |          | _ į<br>,-     |   |  | •                 |          |
| 42  |                                  | ent tax credit and EDZ employment incentive credit (from Form DTF-603)                              | 42. |   | ļ   |          | _  <br>;-     |   | $\perp$  | <u>.</u>          | Щ        |
| 43  | Financial ser                    | rvices industry EDZ investment tax credit and EDZ employment incentive credit                       | -   |   |   |          |               |   |  |                   |          |
|     | •                                | PTF-605)  | 43. |   | <u>,                                    </u>  | _        |               | - | <del>                                     </del> | • -               |          |
| 44  | _                                | x credit (from Form DTF-601, line 21)   | 44. |   | <u>,</u>                                      |          |               |   | <del>                                     </del> | •                 |          |
| 45  | -                                | credit (from Form DTF-601.1)  | 45. |   | - <del> </del>                                |          | _¦-           | + | ₩  | <u>.</u>          |          |
| 46  | -                                | ax credit (from Form DTF-602)   | 46. | - | · -   |          | _¦-           |   | ₩  | •                 |          |
| 47  |                                  | onal mortgage recording tax credit carryover (attach computation)                                   | 47. |   | · -   |          |               |   | +  | •                 | Н        |
| 48  |                                  | d energy credit carryover (attach computation)  | 48. |   | · -   |          |               |   | +  | •                 | Н        |
| 49  |                                  | of persons with disabilities credit (from Form IT-251, line 15)                                     | 49. |   | - <del>i</del> —                              | _        | - <u>-</u>    |   | ₩  | •                 |          |
| 50  |                                  | els credit (from Form IT-253, line 13)  | 50. |   | · —   |          | _;-           |   | Щ.   | •                 | щ        |
| 51  |                                  | through 50. This is your total New York State nonrefundable credits.                                | 51. |   |   |          | $\neg$        |   | Τ  | Т                 | П        |
|     |                                  | and on Form IT-201, line 39 (see page 36, Section B, Note)  | 31. |   | - <del>,</del>                                |          | _,-           |   |  | •                 |          |
|     |                                  | ity of New York non-carryover credits (see page 37)   |     |   |   |          |               |   |  |                   |          |
| 52  | Full-year city                   |   | 52. |   | ·;  |          | _ <u> </u> -  |   | <u> </u>   | •                 |          |
|     |                                  | ·   | 53. |   | . <del>,</del>                                |          | _;-           |   | $\bot$   | <u>•</u>          |          |
| 54  |                                  | and 53. This is your total city of New York nonrefundable credits.                                  |     |   |   |          | _             |   | _  | _                 | 1        |
|     | Enter here                       | and on Form IT-201, line 48   | 54. |   | <u>,                                     </u> |          | _ ;-          |   | Ш  | <u>•</u>          | <u> </u> |
| Sec | ction D — Re                     | efundable New York State, City of New York, and Yonkers credits (see page 37)                       | )   |   |   |          |               |   |  |                   |          |
|     | 55                               | Farmers' school tax credit (from Form IT-217, line 19)  | 55. |   | <u>,                                    </u>  |          | _ [ ¯         |   | $oldsymbol{\perp}$                               | ∙∟                |          |
| _   | 56                               | Investment credit for new businesses (from Form IT-212)   | 56. |   | <u> </u>                                      |          | _ į́-         |   |  | $\cdot$ $igsqcup$ | Щ        |
|     | 57                               | Financial services industry investment credit for new businesses (from Form IT-252)                 | 57. |   | <u>.</u> j                                    |          | _ į<br>,-     |   |  | •                 |          |
|     | 58                               | EDZ investment tax credit and EDZ employment incentive credit for new                               |     |   |   |          |               |   |  |                   |          |
|     |                                  | businesses (from Form DTF-603)  | 58. |   | - ;   |          | _  <br>_ • -  |   |  | •                 |          |
|     | <b>5</b> 9                       | Financial services industry EDZ investment tax credit and EDZ employment                            |     |   |   |          |               |   | _  |                   | 1        |
| =   |                                  | incentive credit for new businesses (from Form DTF-605)   |     |   | · ;   |          | _;-           |   | <u> </u>   | •                 |          |
|     | 60                               | •   |     |   | ·;  |          | _ <u> </u> -  |   | <u> </u>   | •                 |          |
|     | 57<br>58<br>59<br>60<br>61<br>62 | ZEA wage tax credit for new businesses (from Form DTF-601.1)  | 61. |   |   |          | _;-           |   |  | <u>•</u>          | Ц        |
|     |                                  |   | 25  | 1 | 1 1   |          |               |   |  |                   |          |
|     |                                  | Add lines 55 through 61   | 62. |   |   |          | _;-           |   |  | •                 | Щ        |
|     |                                  | Claim of Right Credit (see page 38)   |     | 1 |   |          | $\overline{}$ |   | $\top$   | $\overline{}$     |          |
|     | 63                               | New York State claim of right credit (from Form IT-257, line 5, attach form)                        |     |   | · -   | $\dashv$ | - إ           | + | +  | <u>.</u>          | $\vdash$ |
|     | 64                               | City of New York claim of right credit (from Form IT-257, line 8, attach form)                      |     | + | - <del>¦</del>                                | -        | _¦-           | + | +  | $\vdash$          | <u> </u> |
|     | 65                               | City of Yonkers claim of right credit (from Form IT-257, line 14, attach form)                      | 05. |   | ,   |          | _;-           |   | Ш  | •                 | Щ        |
|     | 66                               | ,   | 66  | - |   | 1        | $\overline{}$ |   | T  | $\top$            | П        |
|     |                                  | Yonkers other refundable credits. Enter here and on Form IT-201, line 61                            | 66. |   | - <b>;</b>                                    |          | _ ; _         |   |  | •                 | Ш        |