

Investment Tax Credit for the Financial Services Industry

IT-252

Attach this form to	o Fo	rm IT	-201, IT-203,	IT-204, or IT-20	5.					
Name(s) as shown on retu	ırn				Type of business		Identif	iying number as shown o	n return	
Use this form to clain or dealer in connection a regulated investme claim the employmen	on wi nt co	th the mpany	purchase or sa v. The property	ale of stocks, bond must be placed in	ds, or other securitien In service on or after	es, or in providing	inves	tment advisory serv	vices fo	r
Date you started your l	ousin	ess in N	lew York State:	Location of th	ne qualified property (ii	f more than one, at	tach sc	hedule):		
Part 1 — 80% test	(see	instruc	tions)	1						_
Number of admir	nistra	ative a	nd support e	mployees in New	York State for the	current tax yea	r]
Current tax	yea	r	A March 31	B June 30	C September 30	D December 3	31	E Total <i>(A + B + C +</i>	- D)	
Number of administra support employees in										
1 Average number	of ad	ministr	ative and supp	ort employees in N	ew York State (divide to	tal in line above by four)	1.			1
Number of administrat support employees ev		-								
2 Average number			ative and suppo	ort employees ever	where (divide total in l	line above by four)	2.			1
3 Percentage of ac					,		3.			- %
•				ceed 80%?	·	No 🗍				٦
If <i>Yes</i> , skip Pa	rt Ž,	and co	ntinue with Pa	rt 3. If No, see ins	tructions.					
Part 2 — 95% back	-offi	ce tes	t (see instructi	ons)						
Number of admir	nistra	ative a	nd support e	mployees in New	York State on date	e specified]
			Α	В	С	D		E]
			March 31	June 30	September 30	0 December 3	31	Total (A + B + C +	- D)	
4 Current tax year										
5 First test year										
6 Second test year	r									
7 Third test year										
8 Divide the amou							8.		J	
9 Add the amounts	s on	lines 5	, 6, and 7, colu	ımn E			9.			
10 Divide the amou			•				10.			
11 Percentage of em							11.]	%
If the amount on line				an 95%, proceed v	with Part 3; you qua	lify to claim the in	nvestm	ent tax credit.		
Part 3 — Computat	tion	of cre	dit							
Individual or						1			1	7
fiduciary	12						12.		·	_
Beneficiary	13	Share	of fiduciary's	Form 11-252 credi	t from Part 7, colum	nn C	13.			╛
		_								
Dantasa		Partn	ership name:							
Partner				1						
				ion number	P. 6		4.4			7
	14	Partn	er's snare of ir	ivestment tax cred	dit from the partners	snip (see instr.)	14.		•	╛
S corporation shareholder		S cor	poration name	:						
		Emplo	yer identificat	ion number						
	15				redit from the S corp	oration (see instr.)	15.].]
	16						16.		1.	1



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17	Fiduciary — Enter credit alloca	ated to bene	ficiaries					17.		
18							18.			
19	19 Available carryover of unused credit from preceding period(s) (see instructions; attach computation)							19.		
	20 Investment tax credit (add lines 18 and 19)							20.		
	•	,								
	21 Amount on line 20 that qualifies as a current year's new business investment and for which a refund is being elected.							21.		
	Individuals — Enter the line 21	amount and	code <i>252</i> on Fo	orm IT-201	I-ATT, line	12, or Form I	7-203-ATT, lir	ne 12.		
	Fiduciaries — Include the line	e 21 amount	on Form IT-20	05, line 3	3.					
22	Subtract line 21 from line 20. T	his is your r	nonrefundable	investme	ent tax cre	edit		22.		
	Individuals — Enter the line 22	amount and	code <i>252</i> on F	orm IT-20)1-ATT, line	6, or Form I	T-203-ATT, li	ne 7.		
	Fiduciaries — Include the line	e 22 amount	on Form IT-20	05, line 1	0.					
Par	t 4 — Summary of addback	of credit o	n early dispo	ositions	1					
23	Individual's addback of credit of	on early disp	ositions (from	line 36, co	olumn H)			23.		
24	,							24.		
	Partner's share of addback of							25.		
	S corporation shareholder's sh			-	-			26.		
27	Fiduciary — enter amount from	n Part 7, <i>Fid</i>	<i>luciary</i> line, co	olumn D				27.		
28	Total (add lines 23 through 27)							28.	•	
	Individuals — Enter the line 28				1-ATT, line 2	20, or Form I	F-203-ATT, lir	ne 19.		
	Fiduciaries — Include the line				_					
	riddelaries — include the line	e 28 amount	on Form 11-20	05, line 1	2.					
Dar				05, line 1	2.					
Par	t 5 — Investments in qualifi		у	05, line 1			F		F	
	t 5 — Investments in qualifi A Description of property	ed propert	y B Principal use	05, line 1	C Date	D Useful life	E Investment		F Investment tax credit	
	t 5 — Investments in qualifi A	ed propert	у	05, line 1	С				•	
(lis	t 5 — Investments in qualifi A Description of property	ed propert	y B Principal use	05, line 1	C Date	Useful life	Investment		Investment tax credit	
	t 5 — Investments in qualifi A Description of property	ed propert	y B Principal use	05, line 1	C Date	Useful life	Investment		Investment tax credit	
(lis	t 5 — Investments in qualifi A Description of property	ed propert	y B Principal use	05, line 1	C Date	Useful life	Investment		Investment tax credit	
(lis	t 5 — Investments in qualifi A Description of property It each asset and attach schedule if need	ed propert	B Principal use of property		C Date acquired	Useful life in years	Investment credit base		Investment tax credit	
(lis	t 5 — Investments in qualifi A Description of property It each asset and attach schedule if need	ed propert	y B Principal use of property 2, line 7, colur	mn C	C Date acquired	Useful life in years	Investment credit base	30.	Investment tax credit	
(lis	t 5 — Investments in qualification of property at each asset and attach schedule if need to be considered as a schedule in the considered as a schedule in	ed propert	y B Principal use of property 2, line 7, colurcolumn F, include	mn C	C Date acquired	Useful life in years	Investment credit base	30.	Investment tax credit	
(lis	t 5 — Investments in qualification A Description of property It each asset and attach schedule if need Enter amount from Form IT-25 Total investment tax credit (add Individuals — Enter column F	ed propert	Principal use of property 2, line 7, colur column F, include 12.	mn C	C Date acquired	Useful life in years	Investment credit base	30.	Investment tax credit	
(lis	Enter amount from Form IT-25 Total investment tax credit (add Individuals — Enter column F Partnerships — Enter column	ed propertided) 2-ATT, Part and amounts in office total on line in F total on F	Principal use of property 2, line 7, colure column F, include 12. Form IT-204, li	mn C ding the lin	C Date acquired	Useful life in years	Investment credit base	30.	Investment tax credit	
(lis	t 5 — Investments in qualification A Description of property It each asset and attach schedule if need Enter amount from Form IT-25 Total investment tax credit (add Individuals — Enter column F	ed propertided) 2-ATT, Part and amounts in office total on line in F total on F	Principal use of property 2, line 7, colure column F, include 12. Form IT-204, li	mn C ding the lin	C Date acquired	Useful life in years	Investment credit base	30.	Investment tax credit	
(lis 29 30 31	Enter amount from Form IT-25 Total investment tax credit (add Individuals — Enter column F Partnerships — Enter column	ed properting ded) 2-ATT, Part in diamounts in diamounts in diamounts in diamounts in Fitotal on line in Fitotal on line in Fitotal on line in Fitotal on line	Principal use of property 2, line 7, colur column F, include 12. Form IT-204, liine 12 and on	mn C ling the line ne 19. the Total	C Date acquired	Useful life in years nt)	Investment credit base	30.	Investment tax credit	
(lis 29 30 31	Enter amount from Form IT-25 Total investment tax credit (add Individuals — Enter column Fartnerships — Include column fiduciaries —	2-ATT, Part : d amounts in of total on line n F total on line n F total on line qualified p	Principal use of property 2, line 7, colur column F, include 12. Form IT-204, li ine 12 and on	mn C fling the line the Total addbacl D	Date acquired The solution of Path American Structure of Path American Str	Useful life in years art 7, column	Investment credit base C. disposition	30. 31.	Investment tax credit (column E × 4% (.04))	
30 31	Enter amount from Form IT-25 Total investment tax credit (add Individuals — Enter column Fartnerships — Enter column Fiduciaries — Include column to the Early dispositions of	ed properting ded) 2-ATT, Part of amounts in of total on line in F to	Principal use of property 2, line 7, colur column F, include 12. Form IT-204, li ine 12 and on	mn C ne 19. the Total	C Date acquired one 30 amount / line of Pa	Useful life in years nt)	C. disposition Total inve	30. 31.	Investment tax credit (column E × 4% (.04))	
30 31	Enter amount from Form IT-25 Total investment tax credit (add Individuals — Enter column Fartnerships — Enter column Fiduciaries — Include column to A Description of property	ed propertion 2-ATT, Part and amounts in ore total on line or F total or F tota	Principal use of property 2, line 7, colure column F, include 12. Form IT-204, line 12 and on roperty and C Date property	mn C ne 19. the Total	C Date acquired The 30 amount I line of Pa K of credi E Unused life	useful life in years Int 7, column It on early (C. disposition Total inve	30. 31.	Investment tax credit (column E × 4% (.04)) H Addback of credit o	
30 31	Enter amount from Form IT-25 Total investment tax credit (add Individuals — Enter column Fartnerships — Enter column Fiduciaries — Include column to A Description of property	ed propertion 2-ATT, Part and amounts in ore total on line or F total or F tota	Principal use of property 2, line 7, colure column F, include 12. Form IT-204, line 12 and on roperty and C Date property	mn C ne 19. the Total	C Date acquired The 30 amount I line of Pa K of credi E Unused life	useful life in years Int 7, column It on early (C. disposition Total inve	30. 31.	Investment tax credit (column E × 4% (.04)) H Addback of credit of early dispositions	
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Individuals — Enter the line 36 amount on line 23.

Partnerships — Enter the line 36 amount on Form IT-204, line 20.

Fiduciaries — Include the line 36 amount on the *Total* line of Part 7, column D.

A	В	С	D
Beneficiary's name (same as in Form IT-205, Schedule C)	Identifying number	Share of investment tax credit	Share of addback of credit on early dispositions
Total			
Fiduciary			

Part 8 — Application of credit and computation of carryover (See the instructions to determine if you are required to complete this schedule.)						
37 Total credit (from line 22)	37.					
38 Amount that you applied against your 2005 tax	38.					
39 Amount of credit available for carryover to 2006 (subtract line 38 from line 37)	39.					

