



Claim for Excelsior Jobs Program Tax Credit

Tax Law – Article 1, Section 31; Article 9, Section 187-q;
Article 9-A, Section 210.41; Article 32, Section 1456(u); and Article 33, Section 1511(y)

All filers must enter tax period:

beginning ending

Legal name of corporation filing franchise tax return	Employer identification number (EIN)
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File this form with your franchise tax return. You must also attach a copy of the certificate(s) of tax credit issued by Empire State Development (ESD).

A Year of eligibility (enter a number from 1 to 10; see instructions) ● **A**

B Mark an **X** in the box if you are claiming this credit as a corporate partner (see instructions) ● **B**

Schedule A – Excelsior jobs tax credit component (see instructions)

1 Excelsior jobs tax credit component (see instructions)	●	1	<input type="text"/>	<input type="text"/>
2 Excelsior jobs tax credit component from partnerships (from line 29)	●	2	<input type="text"/>	<input type="text"/>
3 Total excelsior jobs tax credit component (add lines 1 and 2; enter here and on line 13; New York S corporations, see instructions)	●	3	<input type="text"/>	<input type="text"/>

Schedule B – Excelsior investment tax credit component (see instructions)

4 Excelsior investment tax credit component (see instructions)	●	4	<input type="text"/>	<input type="text"/>
5 Excelsior investment tax credit component from partnerships (from line 29)	●	5	<input type="text"/>	<input type="text"/>
6 Total excelsior investment tax credit component (add lines 4 and 5; enter here and on line 14; New York S corporations, see instructions)	●	6	<input type="text"/>	<input type="text"/>

Schedule C – Excelsior research and development tax credit component (see instructions)

7 Excelsior research and development tax credit component (see instructions)	●	7	<input type="text"/>	<input type="text"/>
8 Excelsior research and development tax credit component from partnerships (from line 29)	●	8	<input type="text"/>	<input type="text"/>
9 Total excelsior research and development tax credit component (add lines 7 and 8; enter here and on line 15; New York S corporations, see instructions)	●	9	<input type="text"/>	<input type="text"/>

Schedule D – Excelsior real property tax credit component (see instructions)

10 Excelsior real property tax credit component (see instructions)	●	10	<input type="text"/>	<input type="text"/>
11 Excelsior real property tax credit component from partnerships (from line 29)	●	11	<input type="text"/>	<input type="text"/>
12 Total excelsior real property tax credit component (add lines 10 and 11; enter here and on line 16; New York S corporations, see instructions)	●	12	<input type="text"/>	<input type="text"/>

Schedule E – Credit summary (New York S corporations only complete this schedule if reporting a recapture)

13 Excelsior jobs tax credit component (from line 3)	●	13	<input type="text"/>	<input type="text"/>
14 Excelsior investment tax credit component (from line 6)	●	14	<input type="text"/>	<input type="text"/>
15 Excelsior research and development tax credit component (from line 9)	●	15	<input type="text"/>	<input type="text"/>
16 Excelsior real property tax credit component (from line 12)	●	16	<input type="text"/>	<input type="text"/>
17 Subtotal (add lines 13 through 16)	●	17	<input type="text"/>	<input type="text"/>
18 Recapture of credit taken in previous tax years (see instructions)	●	18	<input type="text"/>	<input type="text"/>
19 Net excelsior jobs program tax credit (see instructions)	●	19	<input type="text"/>	<input type="text"/>



Schedule F – Computation of excelsior jobs program tax credit used, refunded, or credited as an overpayment in the next year (New York S corporations do not complete this section)

20 Tax due before credits (see instructions).....	●	20	
21 Tax credits claimed before the excelsior jobs program tax credit (see instructions).....	●	21	
22 Subtract line 21 from line 20.....		22	
23 Minimum tax (see instructions).....	●	23	
24 Credit limitation (subtract line 23 from line 22; if zero or less, enter 0).....	●	24	
25 Excelsior jobs program tax credit to be used this tax year (see instructions).....	●	25	
26 Unused excelsior jobs program tax credit available for refund or as an overpayment (subtract line 25 from line 19).....	●	26	
27 Excelsior jobs program tax credit to be refunded (limited to the amount on line 26; see instructions).....	●	27	
28 Excelsior jobs program tax credit to be applied as an overpayment to next year's tax (subtract line 27 from line 26; see instructions).....	●	28	

Partnership information (see instructions; attach additional sheets if necessary, using the same format shown)

Name of partnership		● Partnership's EIN		
Credits allocated to taxpayer	● Excelsior jobs tax credit	● Excelsior investment tax credit	● Excelsior R & D tax credit	● Excelsior real property tax credit
Name of partnership		● Partnership's EIN		
Credits allocated to taxpayer	● Excelsior jobs tax credit	● Excelsior investment tax credit	● Excelsior R & D tax credit	● Excelsior real property tax credit
Name of partnership		● Partnership's EIN		
Credits allocated to taxpayer	● Excelsior jobs tax credit	● Excelsior investment tax credit	● Excelsior R & D tax credit	● Excelsior real property tax credit
Name of partnership		● Partnership's EIN		
Credits allocated to taxpayer	● Excelsior jobs tax credit	● Excelsior investment tax credit	● Excelsior R & D tax credit	● Excelsior real property tax credit
Name of partnership		● Partnership's EIN		
Credits allocated to taxpayer	● Excelsior jobs tax credit	● Excelsior investment tax credit	● Excelsior R & D tax credit	● Excelsior real property tax credit
Name of partnership		● Partnership's EIN		
Credits allocated to taxpayer	● Excelsior jobs tax credit	● Excelsior investment tax credit	● Excelsior R & D tax credit	● Excelsior real property tax credit
Name of partnership		● Partnership's EIN		
Credits allocated to taxpayer	● Excelsior jobs tax credit	● Excelsior investment tax credit	● Excelsior R & D tax credit	● Excelsior real property tax credit
Total from additional sheet(s) if any	● Excelsior jobs tax credit	● Excelsior investment tax credit	● Excelsior R & D tax credit	● Excelsior real property tax credit
29 Total credits allocated from partnership(s) (enter here and on lines 2, 5, 8, and 11; see instructions)	●	●	●	●
	29			

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