

# IT-201-ATT Summary of Other Credits and Taxes

# 1986

## Attachment to Form IT-201

- Use only if any of these other credits or taxes apply.

Name(s) as shown on Form IT-201

Your social security number

Schedule OC — Other New York State Credits <i>(see instructions, page 23)</i>		Column A	Column B
1 Resident credit <i>(from Form IT-112R; attach form and copy of other state(s) return)</i> . . . . .	1		
2 Accumulation distribution credit <i>(attach computation)</i> . . . . .	2		
3 New York State child and dependent care credit <i>(from Worksheet line f, page 23)</i> Enter your federal credit from line a of the same worksheet \$ <input type="text"/> <input type="text"/> . Also enter the number of qualifying persons <input type="text"/> cared for in 1986.	3		
4 Investment credit and retail enterprise credit <i>(from Form IT-212; attach form)</i> . . . . .	4		
5 Special additional mortgage recording tax credit <i>(does not apply to mortgage recording tax or to purchase of a single residence; see instructions)</i> . . . . .	5		
6 Solar and wind energy credit carryover from 1985 <i>(from 1985 copy of Form IT-218; attach copy)</i> . . . . .	6		
7 Research and development credit <i>(from Form IT-217; attach form)</i> . . . . .	7		
8 <b>Total</b> <i>(add lines 1 through 7; enter here and on Form IT-201, line 56)</i> . . . . .	8		

Schedule OT — Other New York State Taxes <i>(see instructions, page 24)</i>		Column A	Column B
9a New York State separate tax on lump sum distributions <i>(from Form IT-230 or IT-230.1; attach form)</i> . . . . .	9a		
9b Resident credit against separate tax on lump sum distributions <i>(from Form IT-112.1; attach form and copy of other state(s) return)</i> . . . . .	9b		
9c Subtract line 9b from 9a . . . . .	9c		
10 New York State minimum income tax <i>(from Form IT-220; attach form)</i> . . . . .	10		
11 New York State separate tax on PASS funds <i>(from Form IT-270; attach form)</i> . . . . .	11		
12 Add-back of investment credit and retail enterprise credit on early dispositions <i>(from Form IT-212; attach form)</i> . . . . .	12		
13 Add-back of research and development credit on early dispositions <i>(from Form IT-217; attach form)</i> . . . . .	13		
14 <b>Total</b> <i>(add lines 9c through 13; enter here and on Form IT-201, line 58)</i> . . . . .	14		

Schedule NYC — Other City of New York Taxes <i>(see instructions, page 24)</i>		Column A	Column B
15 Part-year City of New York resident tax <i>(from Form IT-360.1; attach form)</i> . . . . .	15		
16 City of New York minimum income tax <i>(from Form IT-220; attach form)</i> . . . . .	16		
17 City of New York separate tax on lump sum distributions <i>(from Form IT-230 or IT-230.1; attach form)</i> . . . . .	17		
18 City of New York separate tax on PASS funds <i>(from Form IT-270; attach form)</i> . . . . .	18		
19 <b>Total</b> <i>(add lines 15 through 18; enter here and on Form IT-201, line 62)</i> . . . . .	19		

20 Investment credit and retail enterprise credit refund for new businesses <i>(enter here and include on Form IT-201, line 70; see instructions)</i> . . . . .	20		
21 Net investment credit available for carryover to 1987 <i>(from Form IT-212; attach form)</i> . . . . .	21		

## New York State Tax Rate Schedule

If amount on Form IT-201, line 50, is:  
over but not over

Enter on Form IT-201, line 51:

\$ 0	\$1,000	2% of amount on line 50		
1,000	3,000	\$ 20 plus	3% of amount over \$ 1,000	
3,000	5,000	80 plus	4%	" " " 3,000
5,000	7,000	160 plus	5%	" " " 5,000
7,000	9,000	260 plus	6%	" " " 7,000
9,000	11,000	380 plus	7%	" " " 9,000
11,000	13,500	520 plus	8%	" " " 11,000
13,500	16,000	720 plus	9%	" " " 13,500
* 16,000	18,500	945 plus	10%	" " " 16,000
18,500	21,000	1,195 plus	11%	" " " 18,500
21,000	23,500	1,470 plus	12%	" " " 21,000
23,500	26,000	1,770 plus	13%	" " " 23,500
26,000		2,095 plus	13.5%	" " " 26,000

\* If the amount on Form IT-201, line 50, is more than \$16,000, you may qualify for a New York State maximum tax rate of 9.5% on personal service income. See page 16 of the IT-201 instruction booklet and Form IT-250.

You do not owe any New York State income tax if you were a New York State resident for the entire taxable year and you checked:

- Filing status ① and your Form IT-201, line 33 amount is \$4,000 or less.
- Filing status ② or ⑤ and your Form IT-201, line 33 amount is \$8,000 or less.
- Filing status ③ or ④ and your combined Form IT-201, line 33 amounts are \$8,000 or less.

### City of New York Resident Tax Rate Schedule

If amount on Form IT-201, line 48, is:

over	but not over	Enter on Form IT-201, line 60:		
\$ 0	\$1,000	0.9% of amount on line 48		
1,000	3,000	\$ 9 plus	1.4% of amount over \$ 1,000	
3,000	5,000	37 plus	1.8%	" " " 3,000
5,000	7,000	73 plus	2.0%	" " " 5,000
7,000	9,000	113 plus	2.3%	" " " 7,000
9,000	11,000	159 plus	2.5%	" " " 9,000
11,000	13,000	209 plus	2.7%	" " " 11,000
13,000	15,000	263 plus	2.9%	" " " 13,000
15,000	17,000	321 plus	3.1%	" " " 15,000
17,000	19,000	383 plus	3.3%	" " " 17,000
19,000	21,000	449 plus	3.5%	" " " 19,000
21,000	23,000	519 plus	3.8%	" " " 21,000
23,000	25,000	595 plus	4.0%	" " " 23,000
25,000		675 plus	4.3%	" " " 25,000

You do not owe any City of New York resident income tax if you were a City of New York resident for the entire taxable year and you checked:

- Filing status ① and your Form IT-201, line 33 amount is \$5,500 or less.
- Filing status ② or ⑤ and your Form IT-201, line 33 amount is \$11,000 or less.
- Filing status ③ or ④ and your combined Form IT-201, line 33 amounts are \$11,000 or less.

### Family Adjustment Tax Rate Schedule

If amount on Form IT-201, line 49, is:

over	but not over	Enter on Form IT-201, line 52:		
\$ 0	\$1,000	2% of amount on line 49		
1,000	3,000	\$20 plus	3% of amount over \$1,000	
3,000	4,000	\$80 plus	4% of amount over \$3,000	

### Telephone Assistance

For forms and publications, in New York State only, call toll-free 1-800-462-8100  
From areas outside New York State, call (518) 438-1073

For information, in New York State only, call toll-free 1-800-342-3536  
From areas outside New York State, call (518) 438-8581

For refund information only, please wait until after April 15 to call toll-free, in New York State only, 1-800-443-3200  
From areas outside New York State, call (518) 438-6777

Telephone assistance is available from 8 a.m. to 5 p.m., Monday through Friday. If you need to write, please address your letter to:

New York State Tax Department  
Taxpayer Assistance Bureau  
W. A. Harriman Campus  
Albany, New York 12227-0125

**Mail your return in the preaddressed envelope that came with your tax packet. If you do not have one, address your envelope —**

**For refund returns:** New York State Income Tax  
W. A. Harriman Campus  
REFUND '86  
Albany, NY 12227-0125

**For all other returns:** New York State Income Tax  
W. A. Harriman Campus  
Albany, NY 12227-0125