



# SUMMARY OF OTHER CREDITS AND TAXES

IT-201-ATT

## Attachment to Form IT-201

New York State Department of Taxation and Finance

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

— Complete Parts I through III below that apply.

— Complete Part IV on the back if you are subject to the additional tax on unearned income.

### Part I — Other New York State Credits *(see instructions, page 20)*

1 Resident credit <i>(from Form IT-112-R; attach form and copy of return filed with other state or province of Canada)</i> . . . . .	<b>1</b>		
2 Accumulation distribution credit <i>(attach computation)</i> . . . . .	<b>2</b>		
3 Investment credit <i>(from Form IT-212; attach form)</i> . . . . .	<b>3</b>		
4 Special additional mortgage recording tax credit <i>(Tax reform changes apply; see instructions)</i> . . . . .	<b>4</b>		
5 Solar and wind energy credit carryover from 1987 <i>(from Form IT-218.1; attach form)</i> . . . . .	<b>5</b>		
6 Economic development zone credit <i>(total from Forms DTF-601, DTF-602, and DTF-603; attach forms that apply)</i> . . . . .	<b>6</b>		
<b>7 Total</b> <i>(add lines 1 through 6; enter here and on Form IT-201, line 58)</i> . . . . .	<b>7</b>		

### Part II — Other New York State Taxes *(see instructions, page 20)*

8 New York State separate tax on lump-sum distributions <i>(from Form IT-230; attach form)</i> . . . . .	<b>8</b>		
9 Resident credit against separate tax on lump-sum distributions <i>(from Form IT-112.1; attach form and copy of return filed with other state or province of Canada)</i> . . . . .	<b>9</b>		
10 Subtract line 9 from line 8 . . . . .	<b>10</b>		
11 New York State minimum income tax <i>(from Form IT-220; attach form)</i> . . . . .	<b>11</b>		
12 Add-back of investment credit on early dispositions <i>(from Form IT-212; attach form)</i> . . . . .	<b>12</b>		
13 Add-back of economic development zone investment tax credit on early dispositions <i>(from Form DTF-603; attach form)</i> . . . . .	<b>13</b>		
<b>14 Total</b> <i>(add lines 10 through 13; enter here and on Form IT-201, line 61)</i> . . . . .	<b>14</b>		

### Part III — Other City of New York Taxes *(see instructions, page 21)*

15 Part-year city of New York resident tax <i>(from Form IT-360.1; attach form)</i> . . . . .	<b>15</b>		
16 City of New York minimum income tax <i>(from Form IT-220; attach form)</i> . . . . .	<b>16</b>		
17 City of New York separate tax on lump-sum distributions <i>(from Form IT-230; attach form)</i> . . . . .	<b>17</b>		
<b>18 Total</b> <i>(add lines 15 through 17; enter here and on Form IT-201, line 67)</i> . . . . .	<b>18</b>		
19 Investment credit refund for new businesses <i>(enter here and include on Form IT-201, line 75; see instructions)</i> . . . . .	<b>19</b>		
20 Net investment credit available for carryover to 1989 <i>(from Form IT-212; attach form)</i> . . . . .	<b>20</b>		
21 Net economic development zone credit available for carryover to 1989 <i>(from Form DTF-601 or DTF-603; attach forms that apply)</i> . . . . .	<b>21</b>		

**If you are subject to the additional tax on unearned income, complete Part IV, lines 22 through 39, on the back.**

**Attach this form to your Form IT-201**

**Part IV — Additional Tax on Unearned Income Worksheet** (see instructions, page 21)

22	New York adjusted gross income (from Form IT-201, line 32; also enter on line 34 below) .....	22		
23	Deduction for capital loss (from Form IT-201, line 7) .....	23		
24	Federal adjustments and deductions (see instructions) .....	24		
25	New York subtractions (see instructions) .....	25		
26	Add lines 22 through 25 .....	26		
27	Earned income (see instructions) .....	27		
28	Capital gain net income (from Form IT-201, line 7) .....	28		
29	Alimony received (from Form IT-201, line 5) .....	29		
30	New York additions (see instructions) .....	30		
31	Allowable deductions (see instructions) .....	31		
32	Add lines 27 through 31 .....	32		
33	Unearned income (subtract line 32 from line 26; enter here and on Form IT-201, line 54). If line 32 is more than line 26, enter "0" on line 33 and on Form IT-201, lines 53 and 54. ....	33		
34	Enter amount from line 22 above .....	34		
	<b>If line 34 is \$200,000 or more (\$150,000 or more if married filing a separate return), skip lines 35 through 37 and enter .02 on line 38 below.</b>			
35	Enter \$100,000 (or \$50,000 if married and filing a separate return) .....	35		00
36	Subtract line 35 from line 34 .....	36		
37	Divide line 36 by \$100,000 and carry the result to four decimal places .....	37		
38	Multiply line 37 by .02 and carry the result to four decimal places .....	38		
39	<b>Additional tax on unearned income</b> (multiply line 33 by line 38, enter here and on Form IT-201, line 53) .....	39		

**Mail Your Return**

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

**For refund returns:**  
 NYS Income Tax  
 W. A. Harriman Campus  
 REFUND '88  
 Albany, NY 12227-0125

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

**Telephone Assistance**

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

**For information**, call toll free (from New York State only) 1 800 CALL TAX (1 800 225-5829).  
 From areas outside New York State, call (518) 438-8581.

**For refund information only**, please wait until after April 17 to call toll free (from 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:  
 NYS Tax Department  
 Taxpayer Assistance Bureau  
 W. A. Harriman Campus  
 Albany, New York 12227

**Attach this form to your Form IT-201**