**SUMMARY OF OTHER CREDITS AND TAXES**  
*Attachment to Form IT-201*

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

| 1. Resident credit (from Form IT-112-R; attach form and copy of return filed with other state or province of Canada) | 1 |
| 2. Accumulation distribution credit (attach computation) | 2 |
| 3. Investment credit (from Form IT-212; attach form) | 3 |
| 4. Special additional mortgage recording tax credit  
(Tax reform changes apply; see instructions) | 4 |
| 5. Solar and wind energy credit carryover from 1987  
(from Form IT-218.1; attach form) | 5 |
| 6. Economic development zone credit  
(totals from Forms DTF-801, DTF-802, and DTF-803; attach forms that apply) | 6 |
| **7. Total (add lines 1 through 6; enter here and on Form IT-201, line 58)** | 7 |

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

| 8. New York State separate tax on lump-sum distributions (from Form IT-230; attach form) | 8 |
| 9. Resident credit against separate tax on lump-sum distributions  
(from Form IT-112.1; attach form and copy of return filed with other state or province of Canada) | 9 |
| 10. Subtract line 9 from line 8 | 10 |
| 11. New York State minimum income tax (from Form IT-220; attach form) | 11 |
| 12. Add-back of investment credit on early dispositions  
(from Form IT-212; attach form) | 12 |
| 13. Add-back of economic development zone investment tax credit on early dispositions  
(from Form DTF-803; attach form) | 13 |
| **14. Total (add lines 10 through 13; enter here and on Form IT-201, line 61)** | 14 |

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

| 15. Part-year city of New York resident tax (from Form IT-362.1; attach form) | 15 |
| 16. City of New York minimum income tax (from Form IT-220; attach form) | 16 |
| 17. City of New York separate tax on lump-sum distributions (from Form IT-230; attach form) | 17 |
| **18. Total (add lines 15 through 17; enter here and on Form IT-201, line 67)** | 18 |

| 19. Investment credit refund for new businesses  
(enter here and include on Form IT-201, line 75; see instructions) | 19 |
| 20. Net investment credit available for carryover to 1989 (from Form IT-212; attach form) | 20 |
| 21. Net economic development zone credit available for carryover to 1989  
(from Form DTF-801 or DTF-803; attach forms that apply) | 21 |

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)

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>22</td>
<td>New York adjusted gross income (from Form IT-201, line 32; also enter on line 34 below)</td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>Deduction for capital loss (from Form IT-201, line 7)</td>
<td>23</td>
</tr>
<tr>
<td>24</td>
<td>Federal adjustments and deductions (see instructions)</td>
<td>24</td>
</tr>
<tr>
<td>25</td>
<td>New York subtractions (see instructions)</td>
<td>25</td>
</tr>
<tr>
<td>26</td>
<td>Add lines 22 through 25</td>
<td>26</td>
</tr>
<tr>
<td>27</td>
<td>Earned income (see instructions)</td>
<td>27</td>
</tr>
<tr>
<td>28</td>
<td>Capital gain net income (from Form IT-201, line 7)</td>
<td>28</td>
</tr>
<tr>
<td>29</td>
<td>Alimony received (from Form IT-201, line 5)</td>
<td>29</td>
</tr>
<tr>
<td>30</td>
<td>New York additions (see instructions)</td>
<td>30</td>
</tr>
<tr>
<td>31</td>
<td>Allowable deductions (see instructions)</td>
<td>31</td>
</tr>
<tr>
<td>32</td>
<td>Add lines 27 through 31</td>
<td>32</td>
</tr>
<tr>
<td>33</td>
<td>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</td>
<td>33</td>
</tr>
<tr>
<td>34</td>
<td>Enter amount from line 22 above</td>
<td>34</td>
</tr>
</tbody>
</table>

**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.**

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>35</td>
<td>Enter $100,000 (or $50,000 if married and filing a separate return)</td>
<td>35</td>
</tr>
<tr>
<td>36</td>
<td>Subtract line 35 from line 34</td>
<td>36</td>
</tr>
<tr>
<td>37</td>
<td>Divide line 36 by $100,000 and carry the result to four decimal places</td>
<td>37</td>
</tr>
<tr>
<td>38</td>
<td>Multiply line 37 by .02 and carry the result to four decimal places</td>
<td>38</td>
</tr>
<tr>
<td>39</td>
<td>Additional tax on unearned income (multiply line 33 by line 36. enter here and on Form IT-201, line 53)</td>
<td>39</td>
</tr>
</tbody>
</table>

### 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 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