



Claim for Excelsior Jobs Program Tax Credit

IT-607

Tax Law - Sections 31 and 606(qq)

Calendar-year filers, mark an X in the box:

Other filers enter tax period:

beginning and ending

Attach this form to Form IT-201, IT-203, IT-204, or IT-205.

You must also attach the certificate(s) of tax credit issued by Empire State Development (ESD).

Name(s) as shown on return

Identifying number as shown on return

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

Schedule A — Credit components

Part 1 — Excelsior jobs tax credit component (see instructions)

Individual (including sole proprietor), partnership, fiduciary	1	Enter your excelsior jobs tax credit component	1.	<input type="text"/>	.	<input type="text"/>
Partner	2	Enter your share of the excelsior jobs tax credit component from your partnership(s)	2.	<input type="text"/>	.	<input type="text"/>
S corporation shareholder	3	Enter your share of the excelsior jobs tax credit component from your S corporation(s)	3.	<input type="text"/>	.	<input type="text"/>
Beneficiary	4	Enter your share of the excelsior jobs tax credit component from your estates or trust(s)	4.	<input type="text"/>	.	<input type="text"/>
	5	Total excelsior jobs tax credit component (add lines 1 through 4; see instructions)	5.	<input type="text"/>	.	<input type="text"/>

Part 2 — Excelsior investment tax credit component (see instructions)

Individual (including sole proprietor), partnership, fiduciary	6	Enter your excelsior investment tax credit component	6.	<input type="text"/>	.	<input type="text"/>
Partner	7	Enter your share of the excelsior investment tax credit component from your partnership(s)	7.	<input type="text"/>	.	<input type="text"/>
S corporation shareholder	8	Enter your share of the excelsior investment tax credit component from your S corporation(s)	8.	<input type="text"/>	.	<input type="text"/>
Beneficiary	9	Enter your share of the excelsior investment tax credit component from your estates or trust(s)	9.	<input type="text"/>	.	<input type="text"/>
	10	Total excelsior investment tax credit component (add lines 6 through 9; see instructions)	10.	<input type="text"/>	.	<input type="text"/>

Part 3 — Excelsior research and development tax credit component (see instructions)

Individual (including sole proprietor), partnership, fiduciary	11	Enter your excelsior research and development tax credit component	11.	<input type="text"/>	.	<input type="text"/>
Partner	12	Enter your share of the excelsior research and development tax credit component from your partnership(s)	12.	<input type="text"/>	.	<input type="text"/>
S corporation shareholder	13	Enter your share of the excelsior research and development tax credit component from your S corporation(s)	13.	<input type="text"/>	.	<input type="text"/>
Beneficiary	14	Enter your share of the excelsior research and development tax credit component from your estate or trust(s)	14.	<input type="text"/>	.	<input type="text"/>
	15	Total excelsior research and development tax credit component (add lines 11 through 14; see instructions)	15.	<input type="text"/>	.	<input type="text"/>



Part 4 — Excelsior real property tax credit component (see instructions)

Individual (including sole proprietor), partnership, fiduciary	16	Enter your excelsior real property tax credit component ...	16.		.	
Partner	17	Enter your share of the excelsior real property tax credit component from your partnership(s)	17.		.	
S corporation shareholder	18	Enter your share of the excelsior real property tax credit component from your S corporation(s)	18.		.	
Beneficiary	19	Enter your share of the excelsior real property tax credit component from your estates or trust(s)	19.		.	
	20	Total excelsior real property tax credit component (add lines 16 through 19; see instructions)	20.		.	

21 Excelsior jobs program tax credit (add lines 5, 10, 15, and 20) **21.** .

Fiduciaries: Complete Schedule C.

Individuals (including sole proprietors), partners, S corporation shareholders, and beneficiaries: Enter the line 21 amount on line 22.

Schedule B — Partnership, S corporation, estate, and trust information

If you were a partner in a partnership, a shareholder of a New York S corporation, or a beneficiary of an estate or trust and received a share of the excelsior jobs program tax credit from that entity, complete the following information for each partnership, New York S corporation, estate, or trust. For *Type*, enter **P** for partnership, **S** for S corporation, or **ET** for estate or trust.

Name	Type	Employer ID number

Schedule C — Beneficiary's and fiduciary's share of credit components and recapture of credit

A Beneficiary's name (same as on Form IT-205, Schedule C)	B Identifying number	C Share of excelsior jobs tax credit component	D Share of excelsior investment tax credit component	E Share of excelsior research and development tax credit component	F Share of excelsior real property tax credit component	G Share of recapture of credit
Total						
Fiduciary						

Schedule D — Computation of credit

Individuals (including sole proprietors), partners, S corporation shareholders, beneficiaries	22	Enter the amount from line 21	22.		.	
Fiduciaries	23	Enter the amount from Schedule C, <i>Fiduciary</i> line, column C	23.		.	
	24	Enter the amount from Schedule C, <i>Fiduciary</i> line, column D	24.		.	
	25	Enter the amount from Schedule C, <i>Fiduciary</i> line, column E	25.		.	
	26	Enter the amount from Schedule C, <i>Fiduciary</i> line, column F	26.		.	
	27	Total excelsior jobs program tax credit (add lines 22 through 26; see instructions)	27.		.	

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Schedule E — Summary of recapture of credit (see instructions)

28 Individual's and partnership's recapture of credit	28.		.	
29 Beneficiary's share of recapture of credit	29.		.	
30 Partner's share of recapture of credit	30.		.	
31 S corporation shareholder's share of recapture of credit	31.		.	
32 Fiduciaries: enter your share of amount from Schedule C, <i>Fiduciary</i> line, column G	32.		.	
33 Total (add lines 28 through 32)	33.		.	

Individuals (including sole proprietors), partners, S corporation shareholders, and beneficiaries: Enter the line 33 amount and code **607** on Form IT-201-ATT, line 20, or Form IT-203-ATT, line 19.

Fiduciaries: Include the line 33 amount on Form IT-205, line 12.

Partnerships: Enter the line 33 amount and code **607** on Form IT-204, line 148.