



Claim for Investment Tax Credit for the Financial Services Industry

Tax Law – Article 9-A, Sections 210-B.1 and 210-B.2; and Article 33, Section 1511(q)

All filers must enter tax period:

beginning ending

Legal name of corporation	Employer identification number
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File this form with Form CT-3, CT-3-A, CT-3-S, CT-33, CT-33-NL, or CT-33-A.

A If you are claiming this credit as a corporate partner, mark an **X** in the box (see instructions)

Schedule A – Summary of tax credit(s)

1 Unused ITC or EIC from preceding period (New York S corporations, enter 0)	• 1	
2 Recapture of credit(s) (from line 6)	• 2	
3 Net credit (see instructions)	• 3	

Schedule B – Recapture of ITC (see instructions) Attach additional sheets if necessary

A Description of property	B Date acquired	C Date property ceased to qualify	D Life (months)	E Unused life (months)	F Percentage (column E ÷ column D)	G Total original ITC allowed	H Recaptured ITC

Amounts from attached list

4 Recaptured ITC (add column H amounts)	• 4	
5 Additional recapture (see instructions)	• 5	
6 Recapture total (add lines 4 and 5; enter here and on line 2)	• 6	

Schedule C – Computation of credit used or carried forward (New York S corporations do not complete this section)

7 Tax before credits (see instructions)	7		
8 Tax credits claimed before this credit (see instructions).....	• 8		
9 Subtract line 8 from line 7	9		
10 Minimum tax (see instructions)	10		
11 Limitation on credit used (subtract line 10 from line 9; if zero or less, enter 0).....	• 11		
12 Credit to be used this period (see instructions)	• 12		
13 Unused credit (subtract line 12 from line 3)	• 13		
14 Unused expired tax credits (see instructions)	• 14		
15 Unused ITC and EIC available to be carried forward (subtract line 14 from line 13)	• 15		

