



New York S Corporation Shareholders' Information Schedule

Legal name of corporation

Employer identification number (EIN)

LEGAL_NAME

EXT_TP_ID

File with Form CT-3-S

Schedule A – Shareholders' New York State modifications and credits (Enter the total amount reported by the New York S corporation on each line. Each shareholder must include their pro rata share of these amounts on their personal income tax return.)

Part 1 – Total shareholder modifications related to S corporation items (see instructions)

Additions	1	New York State franchise tax imposed under Article 9-A	1	NYS_FRNCH_TX_AMT
	1a	New York taxes imposed under Articles 24-A and 24-B and income taxes imposed by other taxing jurisdictions	1a	NY_INC_TX_IMP_AMT
	2	Federal depreciation deduction from Form CT-399, if applicable	2	FED_DPRC_DED_AMT
Subtractions	3	Other additions (file Form CT-225)	3	OTH_ADD_AMT
	4	Allowable New York depreciation from Form CT-399, if applicable	4	ALW_NYS_DPRC_AMT
	5	Other subtractions (file Form CT-225)	5	OTH_SUBT_AMT
Other items (attach explanation)	6	Additions to itemized deductions	6	FED_ITZDED_AMT
	7	Subtractions from itemized deductions	7	SUBT_DED_AMT

Part 2 – Total S corporation New York State credits and taxes on early dispositions (see instructions; file applicable forms)

START-UP NY tax credits (see instructions)

8	START-UP NY business certificate number	8	CT640_CERT_NMBR
9	Year of the START-UP NY business tax benefit period (enter the year number from 1 to 10)	9	CT640_YR_NMBR
10	START-UP NY telecommunication services excise tax credit (Form CT-640)	10	CT640_TELE_TX_AMT
11	Recapture of START-UP NY tax benefits (Form CT-645)	11	CT640_RECAP_AMT
12	START-UP NY tax elimination credit tax-free NY area allocation factor (Form CT-638)	12	CT638_AREA_PCT
13	START-UP NY tax elimination credit business allocation factor (Form CT-638)	13	CT638_PCT
START-UP NY tax elimination credit factors from partnership (for multiple partnerships attach separate statement; see instructions)			
14	START-UP NY partnership EIN	14	CT640_PT_ID
15	START-UP NY business certificate number (obtain number from your partnership)	15	CT640_PT_NMBR
16	Year of the START-UP NY business tax benefit period (enter the year number from 1 to 10; obtain number from your partnership)	16	CT640_PT_YR_NMBR
17	START-UP NY tax elimination credit tax-free NY area allocation factor (obtain factor from your partnership)	17	CT638_PT_AREA_PCT
18	START-UP NY tax elimination credit business allocation factor (obtain factor from your partnership) ..	18	CT638_PT_PCT

Investment tax credits (see instructions)

19	Investment tax credit and employment incentive credit (Form CT-46)	19	SH_INV_HBC_CR_AMT
20	Investment tax credit on research and development property (Form CT-46)	20	SH_INV_RD_CR_AMT
21	Investment tax credit for eligible farmers on qualified property (Form CT-46)	21	SH_INV_QP_CR_AMT
21a	Investment tax credit for eligible farmers (Form CT-46.2)	21a	CT46_2_CR_AMT
22	Tax on early dispositions – investment tax credit, retail enterprise tax credit, historic barn credit, investment tax credit on research and development property, or investment tax credit for financial services industry (Form CT-44 or CT-46)	22	SH_TX_ON_EDEP_AMT

Empire zone (EZ) tax credits (see instructions)

23	EZ investment tax credit (Form CT-603)	23	SH_EZ_INV_USED_AMT
24			
25	Recaptured tax credit – EZ investment tax credit or EZ investment tax credit for financial services industry (Form CT-603 or CT-605)	25	SH_EZ_RECAP_AMT



Part 2 – Total S corporation New York State credits and taxes on early dispositions (continued)**Qualified empire zone enterprise (QEZE) tax credits (see instructions)**

26	QEZE real property tax credit allowed (Form CT-606)	• 26	CT606_CR_AMT
27	Net recapture of QEZE real property tax credit (Form CT-606)	• 27	RCP_CT606_CR_AMT
28	QEZE tax reduction credit employment increase factor (Form CT-604)	• 28	CT604_EMP_PCT
29	QEZE tax reduction credit zone allocation factor (Form CT-604)	• 29	CT604_ZONE_PCT
30	QEZE tax reduction credit benefit period factor (Form CT-604)	• 30	CT604_PER_PCT

QEZE tax reduction credit factors from partnership (for multiple partnerships attach separate statement; see instructions)

31	QEZE partnership EIN	• 31	QEZE_EIN_ID
32	QEZE employment increase factor (obtain factor from your partnership)	• 32	QEZE_EMP_PCT
33	QEZE zone allocation factor (obtain factor from your partnership)	• 33	QEZE_ZONE_PCT
34	QEZE benefit period factor (obtain factor from your partnership)	• 34	QEZE_BNF_PCT

Farmers' school tax credit (see instructions)

35	Total acres of qualified agricultural property	• 35	CT47_ACRES_AMT
36	Total amount of eligible school district property taxes paid	• 36	CT47_TX_PAID_AMT
37	Total acres of qualified agricultural property converted to nonqualified use	• 37	CT47_CNVRTD_AMT
38	Total acres of qualified conservation property	• 38	CT47_PROP_AMT

Other credits (file applicable forms)

39	Recapture of alternative fuels credit (Form CT-40)	• 39	RCP_CT40_CR_AMT
40	Credit for employment of persons with disabilities (Form CT-41)	• 40	CT41_CR_AMT
41	Rehabilitation of historic properties credit (Form CT-238; also see Form CT-34-SH-I regarding project number reporting)	• 41	CT238_CR_AMT
42	Recapture of rehabilitation of historic properties credit (Form CT-238)	• 42	CT238_RECAP_AMT
43	Clean heating fuel credit (Form CT-241)	• 43	CT241_CR_AMT
44			
45	Empire State commercial production credit (Form CT-246)	• 45	CT246_CR_AMT
46	Empire State film production credit for the current year (Form CT-248)	• 46	CT248_CR_AMT
47	Empire State film production credit for the second year (Form CT-248)	• 47	CT248_2ND_CR_AMT
48	Empire State film production credit for the third year (Form CT-248)	• 48	CT248_3RD_CR_AMT
48a	Recapture of Empire State film production credit (Form CT-248)	• 48a	CT248_RECAP_AMT
49	Long-term care insurance credit (Form CT-249)	• 49	CT249_CR_AMT
50	Credit for purchase of an automated external defibrillator (Form CT-250)	• 50	CT250_CR_AMT
51	Empire State film post-production credit for the current year (Form CT-261)	• 51	CT261_CR_AMT
52	Empire State film post-production credit for the second year (Form CT-261)	• 52	CT261_2ND_CR_AMT
53	Empire State film post-production credit for the third year (Form CT-261)	• 53	CT261_3RD_CR_AMT
53a	Recapture of Empire State film post-production credit (Form CT-261)	• 53a	CT261_RECAP_AMT
54	Excelsior jobs tax credit component (Form CT-607)	• 54	CT607_JOB_CR_AMT
55	Excelsior investment tax credit component (Form CT-607)	• 55	CT607_INV_CR_AMT
56	Excelsior research and development tax credit component (Form CT-607)	• 56	CT607_RD_CR_AMT
57	Excelsior real property tax credit component (Form CT-607)	• 57	CT607_RP_CR_AMT
57a	Excelsior child care services tax credit component (Form CT-607)	• 57a	CT607_CC_CR_AMT
58	Recapture of excelsior jobs program tax credit (Form CT-607)	• 58	CT607_JOB_RECUP_AMT
59	Brownfield redevelopment tax credit site preparation credit component (Form CT-611)	• 59	BR_SITE_CR_AMT
60	Brownfield redevelopment tax credit tangible property credit component (Form CT-611)	• 60	BR_PROP_CR_AMT
61	Brownfield redevelopment tax credit on-site groundwater remediation credit component (Form CT-611)	• 61	BR_GRW_CR_AMT
62	Recapture of brownfield redevelopment tax credit (Form CT-611)	• 62	RCP_CT611_CR_AMT
63	Brownfield redevelopment tax credit site preparation credit component (Form CT-611.1)	• 63	CT222_SITE_AMT
64	Brownfield redevelopment tax credit tangible property credit component (Form CT-611.1)	• 64	CT222_PROP_AMT
65	Brownfield redevelopment tax credit on-site ground water remediation credit component (Form CT-611.1)	• 65	CT222_RDV_AMT
66	Recapture of brownfield redevelopment tax credit (Form CT-611.1)	• 66	CT222_BR_RECUP_AMT
67	Brownfield redevelopment tax credit site preparation credit component (Form CT-611.2)	• 67	CT6112_SITE_AMT
68	Brownfield redevelopment tax credit tangible property credit component (Form CT-611.2)	• 68	CT6112_PROP_AMT
69	Brownfield redevelopment tax credit on-site ground water remediation credit component (Form CT-611.2)	• 69	CT6112_RDV_AMT
70	Recapture of brownfield redevelopment tax credit (Form CT-611.2)	• 70	CT6112_RECUP_AMT

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Part 2 – Total S corporation New York State credits and taxes on early dispositions (continued)

71	Remediated brownfield credit for real property taxes (Form CT-612).....	• 71	CT612_CR_AMT
72	Recapture of remediated brownfield credit for real property taxes (Form CT-612)	• 72	RCP_CT612_CR_AMT
73	Environmental remediation insurance credit (Form CT-613)	• 73	CT613_CR_AMT
74	Recapture of environmental remediation insurance credit (Form CT-613)	• 74	RCP_CT613_CR_AMT
75	Security officer training tax credit (Form CT-631)	• 75	CT631_CR_AMT
76	Economic transformation and facility redevelopment program jobs tax credit component (Form CT-633)	• 76	CT633_JOB_CR_AMT
77	Economic transformation and facility redevelopment program investment tax credit component (Form CT-633)	• 77	CT633_INV_CR_AMT
78	Economic transformation and facility redevelopment program job training tax credit component (Form CT-633)	• 78	CT633_TR_CR_AMT
79	Economic transformation and facility redevelopment program real property tax credit component (Form CT-633)	• 79	CT633_RP_CR_AMT
80	Recapture of economic transformation and facilities redevelopment program tax credit (Form CT-633)...	• 80	CT633_RECAP_AMT
81	Taxicabs and livery service vehicles accessible to persons with disabilities credit (Form CT-236)	• 81	CT236_CR_AMT
82	QETC employment credit (Form DTF-621)	• 82	DTF621_CR_AMT
83	QETC capital tax credit (Form DTF-622)	• 83	DTF622_CR_AMT
84	Recapture of QETC capital tax credit (Form DTF-622)	• 84	RCP_DTF622_CR_AMT
85	Low-income housing credit (Form DTF-624)	• 85	DTF624_CR_AMT
86	Recapture of low-income housing credit (Form DTF-626)	• 86	DTF626_CR_AMT
87	Empire state jobs retention program credit (Form CT-634)	• 87	CT634_CR_AMT
88	Recapture of empire state jobs retention program credit (Form CT-634)	• 88	CT634_RECAP_AMT
89	New York youth jobs program credit (Form CT-635)	• 89	CT635_CR_AMT
90	Alcoholic beverage production credit for beer (Form CT-636)	• 90	CT636_CR_AMT
91	Alcoholic beverage production credit for cider (Form CT-636)	• 91	CT636_CIDER_AMT
92	Alcoholic beverage production credit for wine (Form CT-636)	• 92	CT636_WINE_AMT
93	Alcoholic beverage production credit for liquor containing more than 2%, but not more than 24% alcohol by volume (ABV) (Form CT-636)	• 93	CT636_LIQ_AMT
93a	Alcoholic beverage production credit for liquor containing more than 24% ABV (Form CT-636)	• 93a	CT636_LIQ_24_AMT
94	Alternative fuels and electric vehicle recharging property credit (Form CT-637)	• 94	CT637_CR_AMT
95	Recapture of alternative fuels and electric vehicle recharging property credit (Form CT-637)	• 95	CT637_RECAP_AMT
96			
97	Real property tax credit for manufacturers (Form CT-641)	• 97	CT641_CR_AMT
98	Recapture of real property tax credit for manufacturers (Form CT-641)	• 98	CT641_RECAP_AMT
99	Empire state musical and theatrical production credit (Form CT-642)	• 99	CT642_CR_AMT
100	Hire a veteran credit (Form CT-643)	• 100	CT643_CR_AMT
101	Workers with disabilities tax credit (Form CT-644)	• 101	CT644_CR_AMT
102	Employee training incentive program tax credit (Form CT-646)	• 102	CT646_CR_AMT
103	Farm workforce retention credit (Form CT-647)	• 103	CT647_CR_AMT
104	Life sciences research and development tax credit (Form CT-648)	• 104	CT648_CR_AMT
105	Farm donations to food pantries credit (Form CT-649; also see Form CT-34-SH-I regarding additional informational reporting)	• 105	CT649_CR_AMT
106	Empire State apprenticeship tax credit (Form CT-650)	• 106	CT650_CR_AMT
107	Recovery tax credit (Form CT-651)	• 107	CT651_CR_AMT
108	Employer-provided childcare credit (Form CT-652)	• 108	CT652_CR_AMT
109	New York City musical and theatrical production tax credit (Form CT-654)	• 109	CT654_CR_AMT
110	Empire State digital gaming media production credit (Form CT-660)	• 110	CT660_CR_AMT
111	Farm employer overtime credit (Form CT-661)	• 111	PROCESS CODE - 1007C
112	Commercial security credit (Form CT-663)	• 112	CT663_CR_AMT
113	Recapture of commercial security credit (Form CT-663)	• 113	CT663_RECAP_AMT
114	Newspaper and broadcast media jobs credit (Form CT-665)	• 114	CT665_CR_AMT
115	Recapture of newspaper and broadcast media jobs credit (Form CT-665)	• 115	CT665_RECAP_AMT



Part 2 – Total S corporation New York State credits and taxes on early dispositions (continued)

116	Empire State independent film production credit (Form CT-667)	•	116	CT667_CR_AMT	
117	Recapture of Empire State independent film production credit (Form CT-667)	•	117	CT667_RECAP_AMT	
118	Semiconductor research and development credit (Form CT-668)	•	118	CT668_CR_AMT	
119	Recapture of semiconductor research and development credit (Form CT-668)	•	119	CT668_RECAP_AMT	
120	Semiconductor manufacturing workforce training program credit (Form CT-669)	•	120	CT669_CR_AMT	
121	Recapture of semiconductor manufacturing workforce training program credit (Form CT-669)	•	121	CT669_RECAP_AMT	
122	Other tax credits and recaptures (see instructions)				
				FORM_NAME	CT_FORM_TYPE
				SHRHLDR_NAME	
				SCORP_SHR_AMT	

(complete Schedule B on the last page)

PROCESS CODE - 1007C

Schedule B – Shareholders’ identifying information (see instructions)

Photocopy Schedule B as needed. Attach all additional schedules to this form. Also mark an **X** in the box. ☐

A For each shareholder, enter last name, first name, middle initial on first line; enter home address on second and third lines. <i>(attach federal Schedule K-1 for each shareholder)</i>	B Identifying number (SSN or EIN)	C Percentage of ownership	D Shareholder residency status <i>(make only one entry)</i> 1 for New York State 2 for New York City 3 for Yonkers 4 for NYS nonresident	E Shareholder entity status <i>(make only one entry)</i> I for individual F for estate or trust E for exempt organization
1 SH_SHRHLDR_NAME SHRHDR_LN_1_ADR SHRHDR_LN_2_ADR SHRHDR_CTY_ADR SHRHDR_ST_ADR SHRHDR_ZIP_5_ADR SHRHDR_ZIP_4_ADR	SH_SSN_EIN_ID 1	SH_OWNER_PCT	SH_RES_STATUS_IND	SH_ENT_STATUS_IND
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