



Department of Taxation and Finance

# Claim for EZ Investment Tax Credit and EZ Employment Incentive Credit for the Financial Services Industry

Tax Law – Article 9-A, Sections 210-B.3 and 210-B.4

All filers must enter tax period:

beginning

LIAB\_PRD\_BEG\_DT

ending

LIAB\_PRD\_END\_DT

Employer identification number(s) shown on page 1 of your tax return

EXT\_TP\_ID

Legal name of corporation

LEGAL\_NAME

Name of empire zone (EZ)

EZ\_FS\_ZONE\_NAME

File this claim with your corporation franchise tax return, Form CT-3, CT-3-S, or CT-3-A. Attach a copy of the *Certificate of Eligibility* and retention certificate.

**A** Mark an **X** in the box if you are claiming this credit as a corporate partner (see instructions)..... PRTNR\_IND **A**

## Schedule A – Computation of EZ-ITC and EZ-EIC

### Part 1 – Computation of EZ-ITC

|   |                                                                              |   |   |                   |  |
|---|------------------------------------------------------------------------------|---|---|-------------------|--|
| 1 | Unused EZ-ITC from preceding period (New York S corporations: enter 0) ..... | • | 1 | EZ_FS_INV_PRR_AMT |  |
| 2 | Recapture of EZ-ITC (enter the amount from line 7) .....                     | • | 2 | EZ_FS_INV_RCP_AMT |  |
| 3 | Net EZ-ITC or addback (see instructions) .....                               | • | 3 | EZ_FS_INV_NET_AMT |  |

### Part 2 – Computation of EZ-EIC

|   |                                                                              |   |   |                   |  |
|---|------------------------------------------------------------------------------|---|---|-------------------|--|
| 4 | Unused EZ-EIC from preceding period (New York S corporations: enter 0) ..... | • | 4 | EZ_FS_EMP_PRR_AMT |  |
| 5 | Recapture of EZ-EIC (enter the amount from line 8) .....                     | • | 5 | EZ_FS_EMP_RCP_AMT |  |
| 6 | Net EZ-EIC or addback (see instructions) .....                               | • | 6 | EZ_FS_EMP_NET_AMT |  |

## Schedule B – Computation of recapture of EZ-ITC and EZ-EIC (see instructions)

| A                                 | B                                                                       | C                               | D               | E                    | F                  | G               | H                         | I                  |
|-----------------------------------|-------------------------------------------------------------------------|---------------------------------|-----------------|----------------------|--------------------|-----------------|---------------------------|--------------------|
| Description of property           | Date acquired                                                           | Date property ceased to qualify | Life (months)   | Unused life (months) | Percentage (E ÷ D) | EZ-ITC allowed  | Recaptured EZ-ITC (F × G) | Recaptured EZ-EIC  |
| CT605SCHDCEZITCEIC                |                                                                         |                                 |                 |                      |                    |                 | EZ_ITC_REC_P1_AMT         | EZ_EIC_REC_P1_AMT  |
| compOffRecap                      |                                                                         |                                 |                 |                      |                    |                 | EZ_FS_EIC_RCP1_AMT        | EZ_FS_ITC_RCP1_AMT |
|                                   |                                                                         |                                 | USLFE_MNTH_NMBR |                      | PERCENTAGE         |                 | EZ_FS_EIC_RCP2_AMT        | EZ_FS_ITC_RCP2_AMT |
| PROP_DESC                         | ACQ_DT                                                                  | CSD_QUAL_DT                     |                 | NUSD_LFE_MNTH_NMBR   |                    | EZ_ITC_ALLW_AMT | EZ_FS_EIC_RCP3_AMT        | EZ_FS_ITC_RCP3_AMT |
|                                   |                                                                         |                                 |                 |                      |                    |                 | EZ_FS_EIC_RCP4_AMT        | EZ_FS_ITC_RCP4_AMT |
|                                   |                                                                         |                                 |                 |                      |                    |                 | EZ_FS_EIC_RCP5_AMT        | EZ_FS_ITC_RCP5_AMT |
|                                   |                                                                         |                                 |                 |                      |                    |                 | EZ_FS_EIC_RCP6_AMT        | EZ_FS_ITC_RCP6_AMT |
| Amounts from attached sheets..... |                                                                         |                                 |                 |                      |                    |                 | EZ_FS_EIC_RCP6_AMT        | EZ_FS_ITC_RCP6_AMT |
| 7                                 | Recaptured EZ-ITC (add column H amounts; enter here and on line 2)..... |                                 |                 |                      |                    | •               | 7                         | EZ_FS_TT_ITCRC_AMT |
| 8                                 | Recaptured EZ-EIC (add column I amounts; enter here and on line 5)..... |                                 |                 |                      |                    | •               | 8                         | EZ_FS_TT_EICRC_AMT |



**Schedule C – Computation EZ-EIC and EZ-ITC used and carried forward****Part 1 – Computation of EZ-EIC and EZ-ITC used** (*C corporations only; see instructions*)

|                                                                                                                                                                                                 | <b>A</b><br>EZ-EIC | <b>B</b><br>EZ-ITC |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|--------------------|
| <b>9</b> Tax before credits ( <i>from your franchise tax return</i> ), minus all credits claimed before the EZ-EIC (column A) or before the EZ-ITC (column B) ( <i>see instructions</i> ) ..... | EZ_FS_EMP_TX_AMT   | EZ_FS_INV_TX_AMT   |
| <b>10</b> Fixed dollar minimum tax ( <i>see instructions</i> ) .....                                                                                                                            | EZ_FS_FIX_MTX_AMT  | EZ_FS_MTX_INC_AMT  |
| <b>11</b> EZ credit limitation ( <i>subtract line 10 from line 9</i> ) .....                                                                                                                    | EZ_FS_EMP_LMT_AMT  | EZ_FS_INV_LMT_AMT  |
| <b>12</b> EZ credit used this period ( <i>column A: enter the lesser of line 6 or column A, line 11; column B: enter the lesser of line 3 or column B, line 11</i> ) .....                      | EZ_FS_USED_EIC_AMT | EZ_FS_USED_ITC_AMT |
| <b>13</b> Total EZ-EIC and EZ-ITC used this period ( <i>add line 12, columns A and B; see instructions</i> ) .....                                                                              |                    | EZ_FS_TOT_USED_AMT |

**Part 2 – Credits available for carryforward** (*C corporations only*)

|                                                                                                          |           |                    |
|----------------------------------------------------------------------------------------------------------|-----------|--------------------|
| <b>14</b> Net EZ-ITC from line 3 ( <i>if line 3 is zero or less, enter 0 here and on line 16</i> ) ..... | <b>14</b> | Same as Line 3     |
| <b>15</b> EZ-ITC used from line 12, column B .....                                                       | <b>15</b> | EZ_FS_INV_USED_AMT |
| <b>16</b> EZ-ITC available for carryforward ( <i>subtract line 15 from line 14</i> ) .....               | <b>16</b> | EZ_FS_INV_REM_AMT  |
| <b>17</b> Net EZ-EIC from line 6 ( <i>if line 6 is zero or less, enter 0</i> ) .....                     | <b>17</b> | Same as Line 6     |
| <b>18</b> EZ-EIC used from line 12, column A .....                                                       | <b>18</b> | EZ_FS_EMP_USED_AMT |
| <b>19</b> EZ-EIC available for carryforward ( <i>subtract line 18 from line 17</i> ) .....               | <b>19</b> | EZ_FS_EMP_CRYF_AMT |

