



Department of Taxation and Finance

# Claim for Excelsior Jobs Program Tax Credit

CT-607

Tax Law – Sections 31, 210-B.31, and 1511(y)

All filers must enter tax period:

beginning

LIAB\_PRD\_BEG\_DT

ending

LIAB\_PRD\_END\_DT

File this form with Form CT-3, CT-3-A, CT-3-S, CT-33, CT-33-A, or CT-33-NL.

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

|                                                                                                     |                                                                                                               |
|-----------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|
| Legal name of corporation<br><span style="border: 1px solid black; padding: 2px;">LEGAL_NAME</span> | Employer identification number (EIN)<br><span style="border: 1px solid black; padding: 2px;">EXT_TP_ID</span> |
|-----------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|

**A** Certificate number (see instructions) ..... **A** EX\_CERT\_NMBR

**A1** Project number (see instructions) ..... EX\_JOB\_PRJ\_CD **A1**

**B** Year of eligibility (enter a number from 1 to 10; see instructions) ..... EX\_ELGB\_YR **B**

**B1** Green CHIPS projects only: indicate the phase from your certificate of tax credit issued by ESD (see instr.) .... Phase 1 EX\_ESD\_PHASE\_IND Phase 2

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

## Schedule A: Excelsior jobs tax credit component

|                                                                                                                                             |   |                                                                              |  |
|---------------------------------------------------------------------------------------------------------------------------------------------|---|------------------------------------------------------------------------------|--|
| 1 Excelsior jobs tax credit component (see instructions) .....                                                                              | 1 | <span style="border: 1px solid black; padding: 2px;">EX_JOB_INDV_AMT</span>  |  |
| 2 Excelsior jobs tax credit component from partnerships (from line 33) .....                                                                | 2 | <span style="border: 1px solid black; padding: 2px;">EX_JOB_PSHIP_AMT</span> |  |
| 3 Total excelsior jobs tax credit component (add lines 1 and 2; enter here and on line 16; New York S corporations, see instructions) ..... | 3 | <span style="border: 1px solid black; padding: 2px;">EX_JOB_TOT_AMT</span>   |  |

## Schedule B: Excelsior investment tax credit component

|                                                                                                                                                   |   |                                                                              |  |
|---------------------------------------------------------------------------------------------------------------------------------------------------|---|------------------------------------------------------------------------------|--|
| 4 Excelsior investment tax credit component (see instructions) .....                                                                              | 4 | <span style="border: 1px solid black; padding: 2px;">EX_INV_INDV_AMT</span>  |  |
| 5 Excelsior investment tax credit component from partnerships (from line 33) .....                                                                | 5 | <span style="border: 1px solid black; padding: 2px;">EX_INV_PSHIP_AMT</span> |  |
| 6 Total excelsior investment tax credit component (add lines 4 and 5; enter here and on line 17; New York S corporations, see instructions) ..... | 6 | <span style="border: 1px solid black; padding: 2px;">EX_INV_TOT_AMT</span>   |  |

## Schedule C: Excelsior research and development tax credit component

|                                                                                                                                                                 |   |                                                                             |  |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|---|-----------------------------------------------------------------------------|--|
| 7 Excelsior research and development tax credit component (see instructions) .....                                                                              | 7 | <span style="border: 1px solid black; padding: 2px;">EX_RD_INDV_AMT</span>  |  |
| 8 Excelsior research and development tax credit component from partnerships (from line 33) .....                                                                | 8 | <span style="border: 1px solid black; padding: 2px;">EX_RD_PSHIP_AMT</span> |  |
| 9 Total excelsior research and development tax credit component (add lines 7 and 8; enter here and on line 18; New York S corporations, see instructions) ..... | 9 | <span style="border: 1px solid black; padding: 2px;">EX_RD_TOT_AMT</span>   |  |

## Schedule D: Excelsior real property tax credit component

|                                                                                                                                                         |    |                                                                             |  |
|---------------------------------------------------------------------------------------------------------------------------------------------------------|----|-----------------------------------------------------------------------------|--|
| 10 Excelsior real property tax credit component (see instructions) .....                                                                                | 10 | <span style="border: 1px solid black; padding: 2px;">EX_RP_INDV_AMT</span>  |  |
| 11 Excelsior real property tax credit component from partnerships (from line 33) .....                                                                  | 11 | <span style="border: 1px solid black; padding: 2px;">EX_RP_PSHIP_AMT</span> |  |
| 12 Total excelsior real property tax credit component (add lines 10 and 11; enter here and on line 19; New York S corporations, see instructions) ..... | 12 | <span style="border: 1px solid black; padding: 2px;">EX_RP_TOT_AMT</span>   |  |

## Schedule E: Excelsior child care services tax credit component

|                                                                                                                                                               |    |                                                                             |  |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------|----|-----------------------------------------------------------------------------|--|
| 13 Excelsior child care services tax credit component (see instructions) .....                                                                                | 13 | <span style="border: 1px solid black; padding: 2px;">EX_CC_INDV_AMT</span>  |  |
| 14 Excelsior child care services tax credit component from partnerships (from line 33) .....                                                                  | 14 | <span style="border: 1px solid black; padding: 2px;">EX_CC_PSHIP_AMT</span> |  |
| 15 Total excelsior child care services tax credit component (add lines 13 and 14; enter here and on line 20; New York S corporations, see instructions) ..... | 15 | <span style="border: 1px solid black; padding: 2px;">EX_CC_TOT_AMT</span>   |  |

## Schedule F: Credit summary (New York S corporations only complete this schedule if reporting a recapture)

|                                                                                |    |                                                                             |  |
|--------------------------------------------------------------------------------|----|-----------------------------------------------------------------------------|--|
| 16 Excelsior jobs tax credit component (from line 3) .....                     | 16 | <span style="border: 1px solid black; padding: 2px;">EX_JOB_CR_AMT</span>   |  |
| 17 Excelsior investment tax credit component (from line 6) .....               | 17 | <span style="border: 1px solid black; padding: 2px;">EX_INV_CR_AMT</span>   |  |
| 18 Excelsior research and development tax credit component (from line 9) ..... | 18 | <span style="border: 1px solid black; padding: 2px;">EX_RD_CR_AMT</span>    |  |
| 19 Excelsior real property tax credit component (from line 12) .....           | 19 | <span style="border: 1px solid black; padding: 2px;">EX_RP_CR_AMT</span>    |  |
| 20 Excelsior child care services tax credit component (from line 15) .....     | 20 | <span style="border: 1px solid black; padding: 2px;">EX_CC_CR_AMT</span>    |  |
| 21 Subtotal (add lines 16 through 20) .....                                    | 21 | <span style="border: 1px solid black; padding: 2px;">EX_TOT_CR_AMT</span>   |  |
| 22 Recapture of credit taken in previous tax years (see instructions) .....    | 22 | <span style="border: 1px solid black; padding: 2px;">EX_RECAP_CR_AMT</span> |  |
| 23 Net excelsior jobs program tax credit (see instructions) .....              | 23 | <span style="border: 1px solid black; padding: 2px;">EX_NET_CR_AMT</span>   |  |



**Schedule G: Calculation of excelsior jobs program tax credit used, refunded, or credited as an overpayment in the next year** (New York S corporations do not complete this section)

|                                                                                                                                                                                  |   |           |                   |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|-----------|-------------------|
| <b>24</b> Tax due before credits (see instructions).....                                                                                                                         | • | <b>24</b> | EX_TX_DUE_AMT     |
| <b>25</b> Tax credits claimed before the excelsior jobs program tax credit (see instructions).....                                                                               | • | <b>25</b> | EX_OTH_CR_AMT     |
| <b>26</b> Subtract line 25 from line 24.....                                                                                                                                     |   | <b>26</b> | TX_DUE_LS_OTH_AMT |
| <b>27</b> Minimum tax (see instructions).....                                                                                                                                    | • | <b>27</b> | EX_MIN_TX_AMT     |
| <b>28</b> Credit limitation (subtract line 27 from line 26; if zero or less, enter 0).....                                                                                       | • | <b>28</b> | EX_CR_LIM_AMT     |
| <b>29</b> Excelsior jobs program tax credit to be used this tax year (enter the lesser of line 23 or line 28 here and on your franchise tax return).....                         | • | <b>29</b> | EX_CR_USED_AMT    |
| <b>30</b> Unused excelsior jobs program tax credit available for refund or as an overpayment (subtract line 29 from line 23).....                                                | • | <b>30</b> | EX_CR_UNUSED_AMT  |
| <b>31</b> Excelsior jobs program tax credit to be refunded (limited to the amount on line 30; enter here and on your franchise tax return).....                                  | • | <b>31</b> | EX_RFND_AMT       |
| <b>32</b> Excelsior jobs program tax credit to be applied as an overpayment to next year's tax (subtract line 31 from line 30; enter here and on your franchise tax return)..... | • | <b>32</b> | EX_CR_2_NXT_AMT   |

**Partnership information** (see instructions; submit additional forms if necessary)

|                                                                                                                           |   |                                                |                   |                                                      |                   |                                                |                  |                                                        |                  |                                                              |                  |
|---------------------------------------------------------------------------------------------------------------------------|---|------------------------------------------------|-------------------|------------------------------------------------------|-------------------|------------------------------------------------|------------------|--------------------------------------------------------|------------------|--------------------------------------------------------------|------------------|
| Name of partnership<br>NAME                                                                                               |   |                                                |                   | Partnership's EIN<br>EX_PT_EIN_1_ID                  |                   |                                                |                  |                                                        |                  |                                                              |                  |
| Credits allocated to taxpayer.....                                                                                        | • | Excelsior jobs tax credit<br>EX_PT_JOB_1_AMT   | •                 | Excelsior investment tax credit<br>EX_PT_INV_1_AMT   | •                 | Excelsior R & D tax credit<br>EX_PT_RD_1_AMT   | •                | Excelsior real property tax credit<br>EX_PT_RP_1_AMT   | •                | Excelsior child care services tax credit<br>EX_PT_CC_1_AMT   |                  |
| Name of partnership                                                                                                       |   |                                                |                   | Partnership's EIN<br>EX_PT_EIN_2_ID                  |                   |                                                |                  |                                                        |                  |                                                              |                  |
| Credits allocated to taxpayer.....                                                                                        | • | Excelsior jobs tax credit<br>EX_PT_JOB_2_AMT   | •                 | Excelsior investment tax credit<br>EX_PT_INV_2_AMT   | •                 | Excelsior R & D tax credit<br>EX_PT_RD_2_AMT   | •                | Excelsior real property tax credit<br>EX_PT_RP_2_AMT   | •                | Excelsior child care services tax credit<br>EX_PT_CC_2_AMT   |                  |
| Name of partnership                                                                                                       |   |                                                |                   | Partnership's EIN<br>EX_PT_EIN_3_ID                  |                   |                                                |                  |                                                        |                  |                                                              |                  |
| Credits allocated to taxpayer.....                                                                                        | • | Excelsior jobs tax credit<br>EX_PT_JOB_3_AMT   | •                 | Excelsior investment tax credit<br>EX_PT_INV_3_AMT   | •                 | Excelsior R & D tax credit<br>EX_PT_RD_3_AMT   | •                | Excelsior real property tax credit<br>EX_PT_RP_3_AMT   | •                | Excelsior child care services tax credit<br>EX_PT_CC_3_AMT   |                  |
| Name of partnership                                                                                                       |   |                                                |                   | Partnership's EIN<br>EX_PT_EIN_4_ID                  |                   |                                                |                  |                                                        |                  |                                                              |                  |
| Credits allocated to taxpayer.....                                                                                        | • | Excelsior jobs tax credit<br>EX_PT_JOB_4_AMT   | •                 | Excelsior investment tax credit<br>EX_PT_INV_4_AMT   | •                 | Excelsior R & D tax credit<br>EX_PT_RD_4_AMT   | •                | Excelsior real property tax credit<br>EX_PT_RP_4_AMT   | •                | Excelsior child care services tax credit<br>EX_PT_CC_4_AMT   |                  |
| Name of partnership                                                                                                       |   |                                                |                   | Partnership's EIN<br>EX_PT_EIN_5_ID                  |                   |                                                |                  |                                                        |                  |                                                              |                  |
| Credits allocated to taxpayer.....                                                                                        | • | Excelsior jobs tax credit<br>EX_PT_JOB_5_AMT   | •                 | Excelsior investment tax credit<br>EX_PT_INV_5_AMT   | •                 | Excelsior R & D tax credit<br>EX_PT_RD_5_AMT   | •                | Excelsior real property tax credit<br>EX_PT_RP_5_AMT   | •                | Excelsior child care services tax credit<br>EX_PT_CC_5_AMT   |                  |
| Name of partnership                                                                                                       |   |                                                |                   | Partnership's EIN<br>EX_PT_EIN_6_ID                  |                   |                                                |                  |                                                        |                  |                                                              |                  |
| Credits allocated to taxpayer.....                                                                                        | • | Excelsior jobs tax credit<br>EX_PT_JOB_6_AMT   | •                 | Excelsior investment tax credit<br>EX_PT_INV_6_AMT   | •                 | Excelsior R & D tax credit<br>EX_PT_RD_6_AMT   | •                | Excelsior real property tax credit<br>EX_PT_RP_6_AMT   | •                | Excelsior child care services tax credit<br>EX_PT_CC_6_AMT   |                  |
| Name of partnership                                                                                                       |   |                                                |                   | Partnership's EIN<br>EX_PT_EIN_7_ID                  |                   |                                                |                  |                                                        |                  |                                                              |                  |
| Credits allocated to taxpayer.....                                                                                        | • | Excelsior jobs tax credit<br>EX_PT_JOB_7_AMT   | •                 | Excelsior investment tax credit<br>EX_PT_INV_7_AMT   | •                 | Excelsior R & D tax credit<br>EX_PT_RD_7_AMT   | •                | Excelsior real property tax credit<br>EX_PT_RP_7_AMT   | •                | Excelsior child care services tax credit<br>EX_PT_CC_7_AMT   |                  |
| Total from additional form(s) if any.....                                                                                 | • | Excelsior jobs tax credit<br>EX_PT_JOB_OTH_AMT | •                 | Excelsior investment tax credit<br>EX_PT_INV_OTH_AMT | •                 | Excelsior R & D tax credit<br>EX_PT_RD_OTH_AMT | •                | Excelsior real property tax credit<br>EX_PT_RP_OTH_AMT | •                | Excelsior child care services tax credit<br>EX_PT_CC_OTH_AMT |                  |
| <b>33</b> Total credits allocated from partnership(s) (enter here and on lines 2, 5, 8, 11, and 14; see instructions).... | • | <b>33</b>                                      | EX_PT_JOB_TOT_AMT | •                                                    | EX_PT_INV_TOT_AMT | •                                              | EX_PT_RD_TOT_AMT | •                                                      | EX_PT_RP_TOT_AMT | •                                                            | EX_PT_CC_TOT_AMT |

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