



# Income Tax Worksheet

(12/10)

Volunteer income tax assistance program

Taxpayer name: \_\_\_\_\_

Date: \_\_\_\_\_

<b>New York State Residency Issues</b>		<b>Yes</b>	<b>No</b>
1.	<b>Was your permanent home (domicile) New York State when you entered the military? Military assignment does not affect your domicile (If No, skip to question 14.)</b>		
2.	If your permanent home is New York did you maintain a permanent home (military barracks is not considered a permanent home) outside of New York for the entire taxable year?		
3.	Did you continue to maintain a permanent place in New York for the entire taxable years?		
4.	If your permanent home was New York did you spend more than 30 days in New York for the entire taxable year?		
5.	If not in a foreign country skip question 5 & 6. If you permanent home was New York, were you in a foreign country for at least 450 days during any period of 548 consecutive days?		
6.	If assigned to a foreign country did you or your spouse and minor children spend more than 90 days in New York State?		
	<b>If you checked the shaded boxes for questions 2, 3 and 4 or question 5 and 6 skip to question 14.</b>		
	<b>For Military Filing a Resident Personal Income Tax Return (FORM –IT-201)</b>		
7.	Did you pay child support through the support collection unit for at least one-half of the taxable year?		
8.	Were you, (or spouse) an active volunteer fire fighter or ambulance worker for the entire tax year?		
9.	Was your total household income (income of all individuals living with you) under \$18,000?		
10.	Did you contribute to the NYS retirement system (shown in box 14 on your W-2)?		
11.	Did you receive pension payments or are you a beneficiary receiving pension payments?		
12.	Did you receive income as a member of NYS organized militia for performing active service within New York from either state or federal active duty orders?		
13.	Did you pay undergraduate college tuition expense for yourself, your spouse, or dependents?		
	<b>Nonresident of New York (FORM –IT-203)</b>		
14.	Are you reporting Military Compensation on your federal income tax return?		
15.	If married and your duty station is New York, did your nonresident spouse earn income while in New York? NOTE: If your military spouse was domiciled (home) in New York State at the time he or she marries the service member, the military spouse is still considered a New York resident and you should skip this question.		
	<b>ALL MILITARY FILING A NEW YORK INCOME TAX RETURN</b>		
16.	Did you earn income as an officer in a combat zone for which you had to include this income on your federal income tax return?		
17.	Did you make contributions to a <b>NYS 529</b> College Savings Plan during the tax year?		
18.	Did you earn interest on US government bonds during the tax year?		
	<b>Additional notes:</b>		