New York State Department of Taxation and Finance

Itemized Deduction and Other Credits and Taxes
Attachment to Form IT-201

IT-201-ATT

Beginning this year, if you claim the New York itemized deduction on line 32 of your Form IT-201, you must complete *Part I* below and attach this Form IT-201-ATT to your return.

Name(s) as shown on Form IT-201

Your social security number

- See *Instructions for Form IT-201-ATT* on pages 27 through 30 of your Form IT-201 instructions booklet (IT-201-I or IT-201-P) for assistance.
- Complete all parts and worksheets that apply.
- Attach this Form IT-201-ATT, and any other forms that apply, to your Form IT-201.

Part I — New York State Itemized Deduction (see page 27)

Dollars | Cents

1 Medical and dental expenses *(from federal Schedule A, line 4)* .... **1.**
2 Taxes you paid *(from federal Schedule A, line 9)* .... **2.**
3 Interest you paid *(from federal Schedule A, line 14)* .... **3.**
4 Gifts to charity *(from federal Schedule A, line 18)* .... **4.**
5 Casualty and theft losses *(from federal Schedule A, line 19)* .... **5.**
6 Job expenses and most other miscellaneous deductions *(from federal Schedule A, line 26)* .... **6.**
7 Other miscellaneous deductions *(from federal Schedule A, line 27)* .... ▶ **7.**

8 Total itemized deductions *(from federal Schedule A, line 28)* .... **8.**
9 **State, local and foreign income taxes and other subtraction adjustments** *(see page 27)* ... **9.**
10 Subtract line 9 from line 8 .... **10.**
11 **Addition adjustments** *(see page 28)* .... **11.**

12 Add lines 10 and 11 .... **12.**
13 Itemized deduction adjustment *(see page 28)* .... **13.**
14 **Subtract line 13 from line 12. This is your New York State itemized deduction.**
   (Enter here and on Form IT-201, line 32. Attach this form to your Form IT-201.) .... **14.**

Part II — Other New York State Credits (see page 29)

15 Resident credit *(from Form IT-112-R; attach form and a copy of the return filed with the other state or province of Canada)* .... **15.**

16 Accumulation distribution credit *(attach computation)* .... **16.**
17 Investment credit *(from Form IT-212; attach form)* .... **17.**
18 Special additional mortgage recording tax credit carryover *(see instructions)* .... **18.**
19 Solar and wind energy credit carryover from 1994
   (from Form IT-218.1; attach form) .... **19.**
20 Economic development zone credits *(total from Forms DTF-601, DTF-601.1, DTF-602, and DTF-603; attach forms that apply)* .... **20.**

21 **Total** *(add lines 15 through 20; enter here and on Form IT-201, line 40)* .... **21.**

Part III — Other New York State Taxes (see page 29)

22 New York State separate tax on lump-sum distributions *(from Form IT-230; attach form)* .... **22.**
23 Resident credit against separate tax on lump-sum distributions *(from Form IT-112.1; attach form and a copy of the return filed with the other state or province of Canada)* .... **23.**
24 Subtract line 23 from line 22 .... **24.**
25 New York State minimum income tax *(from Form IT-220; attach form)* .... **25.**
26 Add-back of investment credit on early dispositions *(from Form IT-212; attach form)* .... **26.**
27 Add-back of economic development zone capital tax credit and EDZ investment tax credit on early dispositions *(total from Form DTF-602 or Form DTF-603, or both; attach forms that apply)* .... **27.**
28 Add-back of resident credit for taxes paid to a province of Canada *(from Form IT-112-R; attach form)* ... **28.**
29 New York State tax on capital gain portion of lump-sum distribution
   (from Worksheet A on the back) .... **29.**

30 **Total** *(add lines 24 through 29; enter here and on Form IT-201, line 43)* .... **30.**

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Part IV — Other City of New York Taxes *(see page 30)*

		Dollars	Cents
31	Part-year city of New York resident tax *(from Form IT-360.1; attach form)*	**31.**	
32	City of New York minimum income tax *(from Form IT-220; attach form)*	**32.**	
33	City of New York separate tax on lump-sum distributions *(from Form IT-230; attach form)*	**33.**	
34	City of New York tax on capital gain portion of lump-sum distribution *(from* **Worksheet B** *below)*	**34.**	
35	**Total** *(add lines 31 through 34; enter here and on* **Form IT-201;** *line 49)*	**35.**	

Part V — Carryover and Refund: NYS Investment Credit/EDZ Credits *(see pg. 30)*

36	Net investment credit available for carryover to 1996 *(from Form IT-212; attach form)*	**36.**
37	Net economic development zone credit available for carryover to 1996 *(Total from Forms DTF-601, DTF-601.1, DTF-602 and DTF-603; attach forms that apply. See instructions.)*	**37.**
38	Investment credit refund for new businesses *(enter here and include on Form IT-201, line 58; see instructions)*	**38.**
39	Economic development zone (including zone equivalent area) wage tax credit and EDZ investment tax credit refund(s) *(Total from Forms DTF-601, DTF-601.1, and DTF-603; attach forms that apply. Enter here and on Form IT-201, line 58; see instructions.)*	**39.**

Worksheet A — New York State Tax on Capital Gain Portion of Lump-Sum Distribution (for front page, line 29)

• Complete *Worksheet A* if you are subject to NY State tax on capital gain portion of lump-sum distribution, Form IT-230, Part II.

1 New York State tax on capital gain portion of lump-sum distribution *(from Form IT-230, Part II, line 2,* **New York State** *column)* **1**

2 Enter amount from Form IT-201, line 41 .... **2**

3 Enter amount from Form IT-201, line 36 .... **3**
  • If line 3 is equal to or more than line 2, transfer the above line 1 amount to the front page, line 29. Do not continue with this worksheet.
  • If line 3 is less than line 2, continue on line 4 below.

4 Subtract line 3 from line 2 .... **4**

5 Subtract line 4 from line 1. **Enter here and on the front page, line 29** **5**

Worksheet B — City of New York Tax on Capital Gain Portion of Lump-Sum Distribution (for line 34 above)

• Complete *Worksheet B* if you are subject to the city of NY tax on capital gain portion of lump-sum distribution, Form IT-230, Part II.

1 City of New York tax on capital gain portion of lump-sum distribution *(from Form IT-230, Part II, line 2,* **City of New York** *column)* **1**

2 Enter amount from Form IT-201, line 46 .... **2**

3 Enter amount from Form IT-201, line 45 .... **3**
  • If line 3 is equal to or more than line 2, transfer the above line 1 amount to line 34 above. Do not continue with this worksheet.
  • If line 3 is less than line 2, continue on line 4 below.

4 Subtract line 3 from line 2 .... **4**

5 Subtract line 4 from line 1. **Enter here and on line 34 above** **5**