



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

IT-201-ATT

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

Grid for 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)

Table with 14 rows for itemized deductions, columns for Dollars and Cents.

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

Table with 7 rows for other New York State credits, columns for Dollars and Cents.

Part III — Carryover and Refund: NYS Investment Credit/EDZ Credits (see pg. 29)

Table with 5 rows for carryover and refund credits, columns for Dollars and Cents.

(continued on back)

Part IV — Other New York State Taxes (see page 30)

Dollars Cents

Table with 2 columns: Description and Amount. Rows 26-34 include items like 'New York State separate tax on lump-sum distributions', 'Resident credit against separate tax...', 'Subtract line 27 from line 26', etc.

Worksheet A — New York State Tax on Capital Gain Portion of Lump-Sum Distribution (for line 33 above)

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

Form with 5 numbered steps: 1. New York State tax on capital gain portion of lump-sum distribution; 2. Enter amount from Form IT-201, line 39; 3. Enter amount from Form IT-201, line 36; 4. Subtract line 3 from line 2; 5. Subtract line 4 from line 1.

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

Table with 2 columns: Description and Amount. Rows 35-39 include items like 'Part-year city of New York resident tax', 'City of New York minimum income tax', 'City of New York separate tax on lump-sum distributions', etc.

Worksheet B — City of New York Tax on Capital Gain Portion of Lump-Sum Distribution (for line 38 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.

Form with 5 numbered steps: 1. City of New York tax on capital gain portion of lump-sum distribution; 2. Enter amount from Form IT-201, line 44; 3. Enter amount from Form IT-201, line 43; 4. Subtract line 3 from line 2; 5. Subtract line 4 from line 1.

