



New York State Department of Taxation and Finance
Resident Income Tax Return (long form)
New York State • New York City • Yonkers

IT-201

For the full year January 1, 2008, through December 31, 2008, or fiscal year beginning ... 0 8
and ending ...

For help completing your return, see the combined instructions for Forms IT-150 and IT-201.

Form with sections for: Important: You must enter your social security number(s) in the boxes to the right. Your first name and middle initial, Spouse's first name and middle initial, Mailing address, City, village, or post office, State, ZIP code, Apartment number, New York State county of residence, School district name, School district code number, Decedent information, Taxpayer's date of death, Spouse's date of death.

- (A) Filing status — mark an X in one box:
1 Single
2 Married filing joint return
3 Married filing separate return
4 Head of household
5 Qualifying widow(er) with dependent child

(B) Did you itemize your deductions on your 2008 federal income tax return? Yes No

(C) Can you be claimed as a dependent on another taxpayer's federal return? Yes No

(D) Have you underreported your tax due on past returns? To correct this without penalty, visit us at www.nystax.gov

(E) Did you or your spouse maintain living quarters in NYC during 2008? Yes No

(F) NYC residents and NYC part-year residents only:
(1) Number of months you lived in NYC in 2008
(2) Number of months your spouse lived in NYC in 2008

(G) Enter your 2-digit special condition code if applicable. If applicable, also enter your second 2-digit special condition code

Federal income and adjustments

Only full-year New York State residents may file this form. For lines 1 through 18 below, enter your income items and total adjustments as they appear on your federal return (see page 67). Also see page 67 instructions for showing a loss.

Table with 18 rows for income items and 2 columns for Dollars and Cents. Items include Wages, salaries, tips, Taxable interest income, Ordinary dividends, Taxable refunds, credits, or offsets of state and local income taxes, Alimony received, Business income or loss, Capital gain or loss, Other gains or losses, Taxable amount of IRA distributions, Taxable amount of pensions and annuities, Rental real estate, royalties, partnerships, S corporations, trusts, etc., Farm income or loss, Unemployment compensation, Taxable amount of social security benefits, Other income, Add lines 1 through 15, Total federal adjustments to income, Subtract line 17 from line 16.

You must file all four pages of this original scannable return with the Tax Department.



▼ Enter your social security number

Dollars Cents

19 Enter the amount from line 18 on page 1. This is your federal adjusted gross income. 19. .

New York additions (see page 68)

20 Interest income on state and local bonds and obligations (but not those of NY State or its local governments) 20. .
 21 Public employee 414(h) retirement contributions from your wage and tax statements (see page 69) 21. .
 22 New York's 529 college savings program distributions (see page 69) 22. .
 23 Other (see page 70) Identify: 23. .
 24 Add lines 19 through 23 24. .

New York subtractions (see page 73)

25 Taxable refunds, credits, or offsets of state and local income taxes (from line 4) 25. .
 26 Pensions of NYS and local governments and the federal government (see page 73) 26. .
 27 Taxable amount of social security benefits (from line 14) 27. .
 28 Interest income on U.S. government bonds 28. .
 29 Pension and annuity income exclusion (see page 73) 29. .
 30 New York's 529 college savings program deduction / earnings 30. .
 31 Other (see page 74) Identify: 31. .
 32 Add lines 25 through 31 32. .
 33 Subtract line 32 from line 24. This is your New York adjusted gross income. 33. .

Standard deduction or itemized deduction (see page 78)

34 Enter your standard deduction (from the table below) or your itemized deduction (from the worksheet below). Mark an X in the appropriate box: • Standard ... or ... • Itemized 34. .
 35 Subtract line 34 from line 33 (if line 34 is more than line 33, leave blank) 35. .
 36 Dependent exemptions (not the same as total federal exemptions; see page 80) 36. 0 0 0 . 0 0
 37 Subtract line 36 from line 35. This is your taxable income. 37. .

◀ OR ▶

New York State standard deduction table

Filing status (from the front page)	Standard deduction (enter on line 34 above)
① Single and you marked item C Yes	\$ 3,000
① Single and you marked item C No	7,500
② Married filing joint return	15,000
③ Married filing separate return	7,500
④ Head of household (with qualifying person)	10,500
⑤ Qualifying widow(er) with dependent child	15,000

New York State itemized deduction worksheet

a Medical and dental expenses (from federal Schedule A, line 4)	a. <input type="text"/> . <input type="text"/>
b Taxes you paid (from federal Schedule A, line 9)	b. <input type="text"/> . <input type="text"/>
c Interest you paid (from federal Schedule A, line 15)	c. <input type="text"/> . <input type="text"/>
d Gifts to charity (from federal Schedule A, line 19)	d. <input type="text"/> . <input type="text"/>
e Casualty and theft losses (from federal Schedule A, line 20) ...	e. <input type="text"/> . <input type="text"/>
f Job expenses and most other miscellaneous deductions (from federal Schedule A, line 27)	f. <input type="text"/> . <input type="text"/>
g Other miscellaneous deductions (from federal Schedule A, line 28)	g. <input type="text"/> . <input type="text"/>
h Enter amount from federal Schedule A, line 29	h. <input type="text"/> . <input type="text"/>
i State, local, and foreign income taxes and other subtraction adjustments (see page 78)	i. <input type="text"/> . <input type="text"/>
j Subtract line i from line h	j. <input type="text"/> . <input type="text"/>
k Addition adjustments (see page 79)	k. <input type="text"/> . <input type="text"/>
l Add lines j and k	l. <input type="text"/> . <input type="text"/>
m Itemized deduction adjustment (see page 80)	m. <input type="text"/> . <input type="text"/>
n Subtract line m from line l	n. <input type="text"/> . <input type="text"/>
o College tuition itemized deduction (see Form IT-272)	o. <input type="text"/> . <input type="text"/>
p Add lines n and o. This is your New York State itemized deduction; enter on line 34 above.	p. <input type="text"/> . <input type="text"/>

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Name(s) as shown on page 1

▼ Enter your social security number

Tax computation, credits, and other taxes (see page 81)

		Dollars	Cents
38 Enter the amount from line 37 on page 2. This is your taxable income .	38.		
39 New York State tax on line 38 amount (see page 81 and Tax computation on page 52)	39.		
40 New York State household credit (from table 1, 2, or 3 on pages 81 and 82)	40.		
41 Resident credit (attach Form IT-112-R or IT-112-C, or both; see page 82)	41.		
42 Other New York State nonrefundable credits (from Form IT-201-ATT, line 7; attach form)	42.		
43 Add lines 40, 41, and 42	43.		
44 Subtract line 43 from line 39 (if line 43 is more than line 39, leave blank)	44.		
45 Net other New York State taxes (from Form IT-201-ATT, line 30; attach form)	45.		
46 Add lines 44 and 45. This is the total of your New York State taxes .	46.		

New York City and Yonkers taxes, credits, and tax surcharges

47 New York City resident tax on line 38 amount (see page 82)	47.		
48 New York City household credit (from table 4, 5, or 6 on page 83)	48.		
49 Subtract line 48 from line 47 (if line 48 is more than line 47, leave blank)	49.		
50 Part-year New York City resident tax (attach Form IT-360.1)	50.		
51 Other New York City taxes (from Form IT-201-ATT, line 34; attach form)	51.		
52 Add lines 49, 50, and 51	52.		
53 NY City nonrefundable credits (from Form IT-201-ATT, line 10; attach form)	53.		
54 Subtract line 53 from line 52 (if line 53 is more than line 52, leave blank)	54.		
55 Yonkers resident income tax surcharge (see page 84)	55.		
56 Yonkers nonresident earnings tax (attach Form Y-203)	56.		
57 Part-year Yonkers resident income tax surcharge (attach Form IT-360.1)	57.		
58 Add lines 54 through 57. This is the total of your New York City and Yonkers taxes / surcharges .	58.		

See instructions on pages 82, 83, and 84, to compute New York City and Yonkers taxes, credits, and tax surcharges.

59 Sales or use tax (See the instructions on page 85.) Do not leave line 59 blank. **59.**

Voluntary contributions (whole dollar amounts only; see page 86)

60a Return a Gift to Wildlife	60a.		0	0
60b Missing/Exploited Children Fund	60b.		0	0
60c Breast Cancer Research Fund	60c.		0	0
60d Alzheimer's Fund	60d.		0	0
60e Olympic Fund (\$2 or \$4; see page 86)	60e.		0	0
60f Prostate Cancer Research Fund	60f.		0	0
60g National 9/11 Memorial	60g.		0	0
60 Add lines 60a through 60g. This is your total voluntary contributions .	60.		0	0
61 Add lines 46, 58, 59, and 60. This is your total New York State, New York City, and Yonkers taxes, sales or use tax, and voluntary contributions .	61.			

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[Social Security Number Field]

62 Enter the amount from line 61 on page 3. This is your total New York State, New York City, and Yonkers taxes, sales or use tax, and voluntary contributions. Dollars Cents 62. [] . []

Payments and refundable credits (see page 87)

Table with 5 columns: Line number, Description, Amount, and Cents. Rows include Empire State child credit, NYS/NYC child and dependent care credit, NY State earned income credit (EIC), NY State noncustodial parent EIC, Real property tax credit, College tuition credit, NY City school tax credit, NY City earned income credit, Other refundable credits, Total New York State tax withheld, Total New York City tax withheld, Total Yonkers tax withheld, Total estimated tax payments, and Total Add lines 63 through 75.

Forms IT-2 and/or IT-1099-R must be completed and attached to your return instead of federal Forms W-2 and/or 1099-R. Staple them (and any other applicable forms) to the top of this page 4. See Step 11 on page 94 for the proper assembly of your four-page return and all attachments.

Your refund/amount overpaid (see page 90)

77 If line 76 is more than line 62, subtract line 62 from line 76. 77. [] . []
78 Amount of line 77 that you want refunded to you. Complete line 82. Refund 78. [] . []
79 Amount of line 77 that you want applied to your 2009 estimated tax (see instructions) 79. [] . []

Amount you owe (see page 91)

80 If line 76 is less than line 62, subtract line 76 from line 62. Complete line 82. Owe 80. [] . []
81 Estimated tax penalty (include this amount in line 80 or reduce the overpayment on line 77; see page 91) 81. [] . []

82 Account information (see page 92) Mark one: [] Refund - Direct deposit [] Owe - Electronic funds withdrawal
82a Routing number [] Electronic funds withdrawal effective date []
82b Account number [] 82c Account type [] Checking [] Savings

Third-party designee? (see instr.) Yes [] No [] Print designee's name [] Designee's phone number () [] Personal identification number (PIN) [] E-mail: []

Paid preparer's use only Preparer's signature [] Date [] Preparer's SSN or PTIN [] Employer identification number [] Firm's name (or yours, if self-employed) [] Mark an X if self-employed: [] Address [] E-mail: []

Sign your return here Your signature [] Your occupation [] Spouse's signature (if joint return) [] Spouse's occupation (if joint return) [] Date [] Daytime phone number [] E-mail: []

Mail your completed return and any attachments to: STATE PROCESSING CENTER, PO BOX 61000, ALBANY NY 12261-0001. For information about private delivery services, see page 38.

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