



Department of Taxation and Finance

# Resident Income Tax Return

New York State • New York City • Yonkers • MCTMT

# IT-201

For the full year January 1, 2016, through December 31, 2016, or fiscal year beginning ...  and ending ...

For help completing your return, see the instructions, Form IT-201-I.

Your first name	MI	Your last name (for a joint return, enter spouse's name on line below)	Your date of birth (mmdyyyy)	Your social security number
Spouse's first name	MI	Spouse's last name	Spouse's date of birth (mmdyyyy)	Spouse's social security number
Mailing address (see instructions, page 13) (number and street or PO box)			Apartment number	New York State county of residence
City, village, or post office	State	ZIP code	Country (if not United States)	School district name
Taxpayer's permanent home address (see instructions, page 13) (number and street or rural route)			Apartment number	School district code number <input type="text"/>
City, village, or post office	State	ZIP code	Taxpayer's date of death (mmdyyyy)	Spouse's date of death (mmdyyyy)
	<b>NY</b>		Decedent information <input type="text"/>	<input type="text"/>

- A Filing status** (mark an **X** in one box):
- ①  Single
  - ②  Married filing joint return (enter spouse's social security number above)
  - ③  Married filing separate return (enter spouse's social security number above)
  - ④  Head of household (with qualifying person)
  - ⑤  Qualifying widow(er) with dependent child

**B** Did you itemize your deductions on your 2016 federal income tax return? Yes  No

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

**D1** Did you have a financial account located in a foreign country? (see page 14) Yes  No

**D2 Yonkers residents and Yonkers part-year residents only:**

(1) Did you receive a property tax freeze or property tax relief credit? (see page 14) Yes  No

(2) If Yes, enter the total amount .00

**E** (1) Did you or your spouse maintain living quarters in NYC during 2016? (see page 14) Yes  No

(2) Enter the number of days spent in NYC in 2016 (any part of a day spent in NYC is considered a day)

**F NYC residents and NYC part-year residents only** (see page 14):

(1) Number of months you lived in NYC in 2016

(2) Number of months your spouse lived in NYC in 2016

**G** Enter your 2-character special condition code(s) if applicable (see page 14)

**H Dependent exemption information** (see page 15)

First name	MI	Last name	Relationship	Social security number	Date of birth (mmdyyyy)

If more than 7 dependents, mark an **X** in the box.



For office use only

Your social security number
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**Federal income and adjustments** (see page 15)

Whole dollars only

1	Wages, salaries, tips, etc. ....	1	.00
2	Taxable interest income .....	2	.00
3	Ordinary dividends .....	3	.00
4	Taxable refunds, credits, or offsets of state and local income taxes (also enter on line 25) .....	4	.00
5	Alimony received .....	5	.00
6	Business income or loss (submit a copy of federal Schedule C or C-EZ, Form 1040) .....	6	.00
7	Capital gain or loss (if required, submit a copy of federal Schedule D, Form 1040) .....	7	.00
8	Other gains or losses (submit a copy of federal Form 4797) .....	8	.00
9	Taxable amount of IRA distributions. If received as a beneficiary, mark an <b>X</b> in the box ... <input type="checkbox"/>	9	.00
10	Taxable amount of pensions and annuities. If received as a beneficiary, mark an <b>X</b> in the box <input type="checkbox"/>	10	.00
11	Rental real estate, royalties, partnerships, S corporations, trusts, etc. (submit copy of federal Schedule E, Form 1040)	11	.00
12	Rental real estate included in line 11 ..... <input type="text" value="12"/>		.00
13	Farm income or loss (submit a copy of federal Schedule F, Form 1040) .....	13	.00
14	Unemployment compensation .....	14	.00
15	Taxable amount of social security benefits (also enter on line 27) .....	15	.00
16	Other income (see page 15) <i>Identify:</i> <input type="text"/>	16	.00
17	Add lines <b>1 through 11</b> and <b>13 through 16</b> .....	17	.00
18	Total federal adjustments to income (see page 15) <i>Identify:</i> <input type="text"/>	18	.00
19	<b>Federal adjusted gross income</b> (subtract line 18 from line 17) .....	19	.00

**New York additions** (see page 16)

20	Interest income on state and local bonds and obligations (but not those of NYS or its local governments)	20	.00
21	Public employee 414(h) retirement contributions from your wage and tax statements (see page 16)	21	.00
22	<b>New York's</b> 529 college savings program distributions (see page 16) .....	22	.00
23	Other (Form IT-225, line 9) .....	23	.00
24	Add lines <b>19</b> through <b>23</b> .....	24	.00

**New York subtractions** (see page 17)

25	Taxable refunds, credits, or offsets of state and local income taxes (from line 4)	25	.00
26	Pensions of NYS and local governments and the federal government (see page 17)	26	.00
27	Taxable amount of social security benefits (from line 15) .....	27	.00
28	Interest income on U.S. government bonds .....	28	.00
29	Pension and annuity income exclusion (see page 18) .....	29	.00
30	<b>New York's</b> 529 college savings program deduction/earnings	30	.00
31	Other (Form IT-225, line 18).....	31	.00
32	Add lines 25 through 31 .....	32	.00
33	<b>New York adjusted gross income</b> (subtract line 32 from line 24) .....	33	.00

**Standard deduction or itemized deduction** (see page 20)

34	Enter your <b>standard deduction</b> (table on page 20) or your <b>itemized deduction</b> (from Form IT-201-D) Mark an <b>X</b> in the appropriate box: <input type="checkbox"/> <b>Standard</b> - or - <input type="checkbox"/> <b>Itemized</b>	34	.00
35	Subtract line 34 from line 33 (if line 34 is more than line 33, leave blank) .....	35	.00
36	Dependent exemptions (enter the number of dependents listed in item H; see page 20) .....	36	
37	<b>Taxable income</b> (subtract line 36 from line 35) .....	37	.00



Name(s) as shown on page 1

Your social security number

Tax computation, credits, and other taxes

Table with 3 columns: Line number, Description, and Amount. Rows include Taxable income (38), NYS tax on line 38 amount (39), NYS household credit (40), Resident credit (41), Other NYS nonrefundable credits (42), Add lines 40, 41, and 42 (43), Subtract line 43 from line 39 (44), Net other NYS taxes (45), and Total New York State taxes (46).

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

Table with 3 columns: Line number, Description, and Amount. Rows include NYC resident tax on line 38 amount (47), NYC household credit (48), Subtract line 48 from line 47 (49), Part-year NYC resident tax (50), Other NYC taxes (51), Add lines 49, 50, and 51 (52), NYC nonrefundable credits (53), Subtract line 53 from line 52 (54), MCTMT net earnings base (54a), MCTMT (54b), Yonkers resident income tax surcharge (55), Yonkers nonresident earnings tax (56), Part-year Yonkers resident income tax surcharge (57), Total New York City and Yonkers taxes / surcharges and MCTMT (58), and Sales or use tax (59).

See instructions on pages 22 through 25 to compute New York City and Yonkers taxes, credits, and surcharges, and MCTMT.

Voluntary contributions (see page 27)

Table with 3 columns: Line number, Description, and Amount. Rows include 60a Return a Gift to Wildlife, 60b Missing/Exploited Children Fund, 60c Breast Cancer Research Fund, 60d Alzheimer's Fund, 60e Olympic Fund (\$2 or \$4; see page 27), 60f Prostate and Testicular Cancer Research and Education Fund, 60g 9/11 Memorial, 60h Volunteer Firefighting & EMS Recruitment Fund, 60i Teen Health Education, 60j Veterans Remembrance, 60k Homeless Veterans, 60l Mental Illness Anti-Stigma Fund, 60m Women's Cancers Education and Prevention Fund, 60n Autism Fund, Total voluntary contributions (60), and Total New York State, New York City, Yonkers, and sales or use taxes, MCTMT, and voluntary contributions (61).



Your social security number

62 Enter amount from line 61 ..... **62** ..... .00

**Payments and refundable credits** (see page 28)

63 Empire State child credit .....	<b>63</b>	.00
63a Family tax relief credit .....	<b>63a</b>	.00
64 NYS/ NYC child and dependent care credit .....	<b>64</b>	.00
65 NYS earned income credit (EIC) .....	<b>65</b>	.00
66 NYS noncustodial parent EIC .....	<b>66</b>	.00
67 Real property tax credit .....	<b>67</b>	.00
68 College tuition credit .....	<b>68</b>	.00
69 NYC school tax credit (also complete F on page 1; see page 29) .....	<b>69</b>	.00
70 NYC earned income credit .....	<b>70</b>	.00
70a NYC enhanced real property tax credit .....	<b>70a</b>	.00
71 Other refundable credits (Form IT-201-ATT, line 18) .....	<b>71</b>	.00
72 Total <b>New York State</b> tax withheld .....	<b>72</b>	.00
73 Total <b>New York City</b> tax withheld .....	<b>73</b>	.00
74 Total <b>Yonkers</b> tax withheld .....	<b>74</b>	.00
75 Total estimated tax payments and amount paid with Form IT-370 .....	<b>75</b>	.00

If applicable, complete **Form(s) IT-2 and/or IT-1099-R** and submit them with your return (see page 12).  
**Do not send federal Form W-2 with your return.**

76 Total payments (add lines 63 through 75) ..... **76** ..... .00

**Your refund, amount you owe, and account information** (see pages 31 through 33)

77 Amount overpaid (if line 76 is more than line 62, subtract line 62 from line 76) ..... **77** ..... .00

78 Amount of line 77 to be refunded  
 Mark one refund choice:  direct deposit (fill in line 83) - or -  paper check ..... **78** ..... .00

79 Amount of line 77 that you want applied to your 2017 estimated tax (see instructions) ..... **79** ..... .00

**Refund?** Direct deposit is the easiest, fastest way to get your refund.  
**See page 32 for payment options.**

80 Amount you owe (if line 76 is less than line 62, subtract line 76 from line 62). To pay by electronic funds withdrawal, mark an **X** in the box  and fill in lines 83 and 84. If you pay by check or money order you **must** complete Form IT-201-V and mail it with your return. .... **80** ..... .00

81 Estimated tax penalty (include this amount in line 80 or reduce the overpayment on line 77; see page 31) ..... **81** ..... .00

82 Other penalties and interest (see page 32) ..... **82** ..... .00

**See page 35 for the proper assembly of your return.**

83 Account information for direct deposit or electronic funds withdrawal (see page 32).  
 If the funds for your payment (or refund) would come from (or go to) an account outside the U.S., mark an **X** in this box (see pg. 32)

83a Account type:  Personal checking - or -  Personal savings - or -  Business checking - or -  Business savings

83b Routing number  83c Account number

84 Electronic funds withdrawal (see page 33) ..... Date  Amount  .00

<b>Third-party designee?</b> (see instr.) Yes <input type="checkbox"/> No <input type="checkbox"/>	Print designee's name	Designee's phone number ( )	Personal identification number (PIN)
	E-mail:		

<b>▼ Paid preparer must complete ▼</b> (see instructions)	Preparer's NYTPRIN	NYTPRIN excl. code
Preparer's signature	Preparer's printed name	
Firm's name (or yours, if self-employed)	Preparer's PTIN or SSN	
Address	Employer identification number	
E-mail:	Date	

<b>▼ Taxpayer(s) must sign here ▼</b>	
Your signature	
Your occupation	
Spouse's signature and occupation (if joint return)	
Date	Daytime phone number ( )
E-mail:	

**See instructions for where to mail your return.**

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# FORM IT-201 2016

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## FILING INSTRUCTIONS

After you print your return, make sure to:

- complete, print, and attach Form IT-2 if you received a W-2 Form;
- complete, print, and attach Form IT-1099-R if you received 1099-R statements that show New York State, New York City, or Yonkers withholding tax;
- complete, print, and attach Form IT-201-D if you itemize your deductions;
- complete, print, and attach all necessary credit forms;
- sign the return; and
- mail your return to the appropriate PO Box below.

If you are enclosing a check or money order, you must include Form IT-201-V with your return and mail it to:

**STATE PROCESSING CENTER  
PO BOX 15555  
ALBANY NY 12212-5555**

If not enclosing a check or money order, mail your return to:

**STATE PROCESSING CENTER  
PO BOX 61000  
ALBANY NY 12261-0001**