



Claim for Investment Tax Credit for the Financial Services Industry

Tax Law – Article 9-A, Sections 210-B.1 and 210-B.2; and Article 33, Section 1511(q)

All filers must enter tax period:

beginning [] ending []

Legal name of corporation [] Employer identification number []

File this form with Form CT-3, CT-3-A, CT-3-S, CT-33, CT-33-NL, or CT-33-A.

A If you are claiming this credit as a corporate partner, mark an X in the box (see instructions) []

Schedule A – Summary of tax credit(s)

1 Unused ITC or EIC from preceding period (New York S corporations, enter 0)	•	1	
2 Recapture of credit(s) (from line 6)	•	2	
3 Net credit (see instructions)	•	3	

Schedule B – Recapture of ITC (see instructions) Attach additional sheets if necessary

A Description of property	B Date acquired	C Date property ceased to qualify	D Life (months)	E Unused life (months)	F Percentage (column E ÷ column D)	G Total original ITC allowed	H Recaptured ITC

Amounts from attached list

4 Recaptured ITC (add column H amounts)	•	4	
5 Additional recapture (see instructions)	•	5	
6 Recapture total (add lines 4 and 5; enter here and on line 2)	•	6	

Schedule C – Computation of credit used or carried forward (New York S corporations do not complete this section)

7 Tax before credits (see instructions)	7		
8 Tax credits claimed before this credit (see instructions).....	•	8	
9 Subtract line 8 from line 7	9		
10 Minimum tax (see instructions)	10		
11 Limitation on credit used (subtract line 10 from line 9; if zero or less, enter 0).....	•	11	
12 Credit to be used this period (see instructions)	•	12	
13 Unused credit (subtract line 12 from line 3)	•	13	
14 Unused expired tax credits (see instructions)	•	14	
15 Unused ITC and EIC available to be carried forward (subtract line 14 from line 13)	•	15	

