



Resident Income Tax Return (long form)

IT-201

New York State • New York City • Yonkers

For the full year January 1, 2005, through December 31, 2005, or fiscal year beginning ... **0 5**
and ending ...

For help completing your return, see the combined instructions, Form IT-150/201-I, or the IT-RP-1 resident packet instructions.

Attach label, or print or type	Important: You must enter your social security number(s) in the boxes to the right.		
	Your first name and middle initial	Your last name <i>(for a joint return, enter spouse's name on line below)</i>	▼ Your social security number
	Spouse's first name and middle initial	Spouse's last name	▼ Spouse's social security number
	Mailing address <i>(see instructions, page 77)</i> (number and street or rural route)	Apartment number	New York State county of residence
City, village, or post office	State	ZIP code	School district name
Permanent home address <i>(see instructions, page 77)</i> (number and street or rural route)		Apartment number	School district code number.....
City, village, or post office	State	ZIP code	Decedent information: Taxpayer's date of death Spouse's date of death
	NY		

- (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 2005 federal income tax return? Yes No

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

(D) If you do not need a NYS income tax forms packet mailed to you next year, mark an X in the box *(see page 78).*

(E) If you or your spouse maintained any living quarters in NY City during 2005, mark an X in the box *(see page 78).*

(F) New York City residents and New York City part-year residents only *(see page 79):*

(1) Number of months **you** lived in NY City in 2005

(2) Number of months **your spouse** lived in NY City in 2005...

(G) Enter your 2-digit special condition code number if applicable *(see page 79).*

If applicable, also enter your second 2-digit special condition code number.

Federal income and adjustments

Only full-year NY 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 80). Also see page 80 instructions for showing a loss.

	Dollars	Cents
1 Wages, salaries, tips, etc.	1.	
2 Taxable interest income	2.	
3 Ordinary dividends	3.	
4 Taxable refunds, credits, or offsets of state and local income taxes <i>(also enter on line 25 on page 2)</i>	4.	
5 Alimony received	5.	
6 Business income or loss <i>(attach a copy of federal Schedule C or C-EZ, Form 1040)</i>	6.	
7 Capital gain or loss <i>(if required, attach a copy of federal Schedule D, Form 1040)</i>	7.	
8 Other gains or losses <i>(attach a copy of federal Form 4797)</i>	8.	
9 Taxable amount of IRA distributions. If received as a beneficiary, mark an X in the box ... <input type="checkbox"/>	9.	
10 Taxable amount of pensions and annuities. If received as a beneficiary, mark an X in the box <input type="checkbox"/>	10.	
11 Rental real estate, royalties, partnerships, S corporations, trusts, etc. <i>(attach copy of federal Schedule E, Form 1040)</i>	11.	
12 Farm income or loss <i>(attach a copy of federal Schedule F, Form 1040)</i>	12.	
13 Unemployment compensation	13.	
14 Taxable amount of social security benefits <i>(also enter on line 27 on page 2)</i>	14.	
15 Other income <i>(see page 80)</i> Identify:	15.	
16 Add lines 1 through 15	16.	
17 Total federal adjustments to income <i>(see page 80)</i> Identify:	17.	
18 Subtract line 17 from line 16. This is your federal adjusted gross income.	18.	

(continued on page 2)



▼ 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 81)

20	Interest income on state and local bonds and obligations (but not those of NY State or its local governments)	20.	<input type="text"/>	.	<input type="text"/>
21	Public employee 414(h) retirement contributions from your wage and tax statements (see page 82)	21.	<input type="text"/>	.	<input type="text"/>
22	New York's 529 college savings program distributions (see page 82)	22.	<input type="text"/>	.	<input type="text"/>
23	Other (see page 83) Identify:	23.	<input type="text"/>	.	<input type="text"/>
24	Add lines 19 through 23	24.	<input type="text"/>	.	<input type="text"/>

New York subtractions (see page 86)

25	Taxable refunds, credits, or offsets of state and local income taxes (from line 4 on page 1)	25.	<input type="text"/>	.	<input type="text"/>
26	Pensions of NYS and local governments and the federal government (see page 86)	26.	<input type="text"/>	.	<input type="text"/>
27	Taxable amount of social security benefits (from line 14 on page 1)	27.	<input type="text"/>	.	<input type="text"/>
28	Interest income on U.S. government bonds	28.	<input type="text"/>	.	<input type="text"/>
29	Pension and annuity income exclusion (see page 86)	29.	<input type="text"/>	.	<input type="text"/>
30	New York's 529 college savings program deduction/earnings	30.	<input type="text"/>	.	<input type="text"/>
31	Other (see page 87) Identify:	31.	<input type="text"/>	.	<input type="text"/>
32	Add lines 25 through 31	32.	<input type="text"/>	.	<input type="text"/>
33	Subtract line 32 from line 24. This is your New York adjusted gross income .	33.	<input type="text"/>	.	<input type="text"/>

Standard deduction or itemized deduction (see page 93)

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 95) 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	Standard deduction — enter on line 34 above.
① Single and you marked item C on page 1 Yes \$ 3,000	
① Single and you marked item C on page 1 No 7,500	
② Married filing joint return 14,600	
③ Married filing separate return 6,500	
④ Head of household (with qualifying person) 10,500	
⑤ Qualifying widow(er) with dependent child 14,600	

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 14)	c. <input type="text"/> . <input type="text"/>
d Gifts to charity (from federal Schedule A, line 18)	d. <input type="text"/> . <input type="text"/>
e Casualty and theft losses (from federal Schedule A, line 19)	e. <input type="text"/> . <input type="text"/>
f Job expenses and most other miscellaneous deductions (from federal Schedule A, line 26)	f. <input type="text"/> . <input type="text"/>
g Other miscellaneous deductions (from federal Schedule A, line 27)	g. <input type="text"/> . <input type="text"/>
h Enter amount from federal Schedule A, line 28 ...	h. <input type="text"/> . <input type="text"/>
i State, local, and foreign income taxes and other subtraction adjustments (see page 93)	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 94)	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 95)	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 page 95)	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"/>

(continued on page 3)



Name(s) as shown on page 1

▼ Enter your social security number

Tax computation, credits, and other taxes (see page 97)

		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 97 and Tax Computation on pages 52 through 54) ..	39.		
40 New York State household credit (from table 1, 2, or 3 on pages 97 and 98)	40.		
41 Resident credit (attach Form IT-112-R or IT-112-C, or both; see page 98)	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 98 and Tax Computation on pages 63 and 64)	47.		
48 New York City household credit (from table 4, 5, or 6 on page 99)	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 100)	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.		

◀ **New York City (NYC) and Yonkers residents only:**
See instructions beginning on page 98 for figuring NYC and Yonkers taxes, credits, and tax surcharges.

59 **Sales or use tax** See the instructions beginning on page 65. **Do not leave line 59 blank.**

Voluntary contributions (whole dollar amounts only; see pages 72, 73, and 102)

60a Return a Gift to Wildlife	60a.		00
60b Missing/Exploited Children Fund	60b.		00
60c Breast Cancer Research Fund	60c.		00
60d Alzheimer's Fund	60d.		00
60e Olympic Fund (\$2 or \$4; see page 102)	60e.		00
60f Prostate Cancer Research Fund	60f.		00
60g WTC Memorial Fund	60g.		00
60 Add lines 60a through 60g. This is your total voluntary contributions	60.		00
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.		

(continued on page 4)



▼ Enter your social security number

[Social Security Number Box]

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. 62. [Dollars] [Cents]

Payments and refundable credits (see page 103)

Table with 3 columns: Line number, Description, and Amount. Rows include NY State child and dependent care credit, NY State earned income credit, 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, and Total estimated tax payments / Amount paid with Form IT-370.

Starting this year, new 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 111 for the proper assembly of your four-page return and all attachments.

Your refund/amount overpaid (see page 106)

75 If line 74 is more than line 62, subtract line 62 from line 74. 75. [Dollars] [Cents]
76 Amount of line 75 that you want refunded to you (for Direct Deposit, see Account information on line 80) Refund 76. [Dollars] [Cents]
77 Estimated tax only Amount of line 75 that you want applied to your 2006 estimated tax. (Do not include any amount that you claimed as a refund on line 76.) .. 77. [Dollars] [Cents]

Amount you owe (see page 107)

78 If line 74 is less than line 62, subtract line 74 from line 62. (For Payment options, see page 107; for electronic funds withdrawal, see Account information on line 80 below.) Owe 78. [Dollars] [Cents]
79 Estimated tax penalty (Include this amount on line 78, or reduce the overpayment on line 75. See page 107.) 79. [Dollars] [Cents]

Account information (see page 108)

80 Mark one box: [] Refund - Direct Deposit... or ... [] Owe - []
a Routing number: []
b Account number: []
c Type: [] Checking [] Savings

Electronic funds withdrawal effective date: []

You can choose to have your refund directly deposited into your bank account. Or, you can have the amount of any New York State tax you owe automatically withdrawn from your bank account. See the instructions on page 109 and fill in lines 80, and 80a, b, and c.

Sign your return below

Third-party designee: Do you want to allow another person to discuss this return with the Tax Dept? (see page 110) Yes [] (complete the following) No []
Designee's name [] Designee's phone number () [] Personal identification number (PIN) []

Paid preparer's use only: Preparer's signature [] Date []
SSN or PTIN: [] Mark an X if self-employed: []
Firm's name (or yours, if self-employed) [] Employer identification number []
Mailing address (number and street or rural route) []
City, village, or post office [] State [] ZIP code []

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

Mail your completed return and any attachments to:

STATE PROCESSING CENTER
PO BOX 61000
ALBANY NY 12261-0001

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

