



Department of Taxation and Finance

Resident Income Tax Return

New York State • New York City • Yonkers • MCTMT

IT-201For the full year January 1, 2020, through December 31, 2020, or fiscal year beginning ... 2020and ending ... 2020

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 (mmddyyyy)	Your Social Security number
Daniel	D	Benham		
Spouse's first name	MI	Spouse's last name	Spouse's date of birth (mmddyyyy)	Spouse's Social Security number
Mailing address (see instructions, page 14) (number and street or PO box)			Apartment number	New York State county of residence
				Warren
City, village, or post office	State	ZIP code	Country (if not United States)	School district name
Taxpayer's permanent home address (see instructions, page 14) (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 (mmddyyyy)
	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)

B Did you itemize your deductions on your 2020 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 15) Yes ☐ No ☒

D2 Were you required to report any nonqualified deferred compensation, as required by IRC § 457A, on your 2020 federal return? (see page 15) Yes ☐ No ☒

E (1) Did you or your spouse maintain living quarters in NYC during 2020? (see page 15) .. Yes ☐ No ☒
(2) Enter the number of days spent in NYC in 2020 (any part of a day spent in NYC is considered a day)

F NYC residents and NYC part-year residents only (see page 15):
(1) Number of months you lived in NYC in 2020

(2) Number of months your spouse lived in NYC in 2020

G Enter your 2-character special condition code(s) if applicable (see page 15)

H Dependent information (see page 16)

First name	MI	Last name	Relationship	Social Security number	Date of birth (mmddyyyy)

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

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For office use only

Your Social Security number

Federal income and adjustments (see page 16)

Whole dollars only

1 Wages, salaries, tips, etc.	1	0	.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, Form 1040)	6		.00
7 Capital gain or loss (if required, submit a copy of federal Schedule D, Form 1040)	7	731	.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 X in the box ☐	9		.00
10 Taxable amount of pensions and annuities. If received as a beneficiary, mark an X in the box ☒	10	1175	.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	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 16) Identify:	16		.00
17 Add lines 1 through 11 and 13 through 16	17	1906	.00
18 Total federal adjustments to income (see page 16) Identify:	18		.00
19 Federal adjusted gross income (subtract line 18 from line 17)	19	1906	.00
19a Recomputed federal adjusted gross income (see page 16, Line 19a worksheet)	19a	1906	.00

New York additions (see page 17)

20 Interest income on state and local bonds and obligations (but not those of NYS or its local governments)	20		.00
21 Public employee 4-14(h) retirement contributions from your wage and tax statements (see page 17)	21		.00
22 New York's 529 college savings program distributions (see page 17)	22		.00
23 Other (Form IT-225, line 9)	23		.00
24 Add lines 19a through 23	24	1906	.00

New York subtractions (see page 18)

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 18)	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 19)	29		.00
30 New York's 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 New York adjusted gross income (subtract line 32 from line 24)	33	1906	.00

Standard deduction or itemized deduction (see page 21)

34 Enter your standard deduction (table on page 21) or your itemized deduction (from Form IT-196) Mark an X in the appropriate box: ☒ Standard - or - ☐ Itemized	34	8000	.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 21)	36	000.00	
37 Taxable income (subtract line 36 from line 35)	37	0	.00



Name(s) as shown on 2009 1

Your Social Security number

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Daniel S. Benham

Tax computation, credits, and other taxes

38	Taxable income (from line 37 on page 2)	38	<u>0</u>	.00
39	NYS tax on line 38 amount (see page 22)	39		.00
40	NYS household credit (page 22, table 1, 2, or 3)	40		.00
41	Resident credit (see page 23)	41		.00
42	Other NYS nonrefundable credits (Form IT-201-ATT, line 7)	42		.00
43	Add lines 40, 41, and 42	43		.00
44	Subtract line 43 from line 39 (if line 43 is more than line 39, leave blank)	44		.00
45	Net other NYS taxes (Form IT-201-ATT, line 30)	45		.00
46	Total New York State taxes (add lines 44 and 45)	46	<u>0</u>	.00

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

47	NYC taxable income (see page 23)	47		.00
47a	NYC resident tax on line 47 amount (see page 23)	47a		.00
48	NYC household credit (page 23)	48		.00
49	Subtract line 48 from line 47a (if line 48 is more than line 47a, leave blank)	49		.00
50	Part-year NYC resident tax (Form IT-360.1)	50		.00
51	Other NYC taxes (Form IT-201-ATT, line 34)	51		.00
52	Add lines 49, 50, and 51	52		.00
53	NYC nonrefundable credits (Form IT-201-ATT, line 10)	53		.00
54	Subtract line 53 from line 52 (if line 53 is more than line 52, leave blank)	54		.00
54a	MCTMT net earnings base	54a		.00
54b	MCTMT	54b		.00
55	Yonkers resident income tax surcharge (see page 26)	55		.00
56	Yonkers nonresident earnings tax (Form Y-203)	56		.00
57	Part-year Yonkers resident income tax surcharge (Form IT-360.1)	57		.00
58	Total New York City and Yonkers taxes / surcharges and MCTMT (add lines 54 and 54b through 57)	58	<u>0</u>	.00
59	Sales or use tax (see page 27; do not leave line 59 blank)	59	<u>0</u>	.00
60	Voluntary contributions (Form IT-227, Part 2, line 1)	60		.00
61	Total New York State, New York City, Yonkers, and sales or use taxes, MCTMT, and voluntary contributions (add lines 46, 58, 59, and 60)	61	<u>0</u>	.00

See instructions on pages 23 through 26 to compute New York City and Yonkers taxes, credits, and surcharges, and MCTMT.



Your Social Security number

62 Enter amount from line 61

62

.00

Payments and refundable credits (see pages 28 through 31)

63 Empire State child credit	63	.00
64 NYS/NVC child and dependent care credit	64	.00
65 NYS earned income credit (EIC)	65	.00
66 NYS noncustodial parent EIC	66	.00
67 Real property tax credit	67	.00
68 College tuition credit	68	.00
69 NYC school tax credit (fixed amount) (also complete F on page 1)	69	.00
69a NYC school tax credit (rate reduction amount)	69a	.00
70 NYC earned income credit	70	.00
70a This line intentionally left blank	70a	
71 Other refundable credits (Form IT-201-ATT, line 18)	71	.00
72 Total New York State tax withheld	72	3832 .00
73 Total New York City tax withheld	73	.00
74 Total Yonkers tax withheld	74	.00
75 Total estimated tax payments and amount paid with Form IT-370	75	.00

If applicable, complete Form(s) IT-2 and/or IT-1000-R and submit them with your return (see page 13).

Do not send federal Form W-2 with your return.

76 Total payments (add lines 63 through 75)

76

3832

.00

Your refund, amount you owe, and account information (see pages 32 through 34)

77 Amount overpaid (if line 70 is more than line 62, subtract line 62 from line 76; see page 32)	77	3832	.00
78 Amount of line 77 available for refund (subtract line 79 from line 77)	78	3832	.00
78a Amount of line 78 that you want to deposit into a NYS 529 account (Form IT-195, line 4) (also submit Form IT-195)	78a	0	.00
78b Total refund after NYS 529 account deposit (subtract line 78a from line 78)	78b		.00

Mark one refund choice: ☐ direct deposit to checking or savings account (fill in line 83) - or - ☒ paper check

Refund? Direct deposit is the easiest, fastest way to get your refund.

79 Amount of line 77 that you want applied to your 2021 estimated tax (see instructions)

79

.00

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.

See page 33 for payment options.

80

81 Estimated tax penalty (include this amount in line 80 or reduce the overpayment on line 77; see page 33)

81

.00

82 Other penalties and interest (see page 33)

82

.00

See page 36 for the proper assembly of your return.

83 Account information for direct deposit or electronic funds withdrawal (see page 34).

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. 34) ☐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 34) Date

Amount

.00

Third-party designee? (see instructions) Yes ☐ No ☐	Print designee's name Email:	Designee's phone number ()	Personal identification number (PIN)
▼ Paid preparer must complete ▼ (see instructions) Preparer's signature: _____ Preparer's printed name: _____ Firm's name (or yours, if self-employed): _____ Address: _____ Email: _____		▼ Taxpayer(s) must sign here ▼ Your signature: _____ Your occupation: Account Manager Spouse's signature and occupation (if joint return): _____ Date: 4-11-2021 Daytime phone number: () - -	
Preparer's NYTPRIN: _____ NYTPRIN excl. code: _____ Preparer's PTIN or SSN: _____ Employer identification number: _____ Date: _____			

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See instructions for where to mail your return.



Form **4852**

(Rev. September 2020)

Department of the Treasury
Internal Revenue Service**Substitute for Form W-2, Wage and Tax Statement, or
Form 1099-R, Distributions From Pensions, Annuities, Retirement
or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.**

▶ Attach to Form 1040, 1040-SR, or 1040-X.

▶ Go to www.irs.gov/Form4852 for the latest information.

OMB No. 1545-0074

Attachment
Sequence No. 04**You must take the following steps before filing Form 4852**

• Attempt to get your Form W-2, Form W-2c, or Form 1099-R (original or corrected) from your employer or payer before contacting the IRS or filing Form 4852.

• If you don't receive the missing or corrected form from your employer or payer by the end of February, you may call the IRS at 800-829-1040 for assistance. You must provide your name, address (including ZIP code), phone number, social security number, and dates of employment. You must also provide your employer's or payer's name, address (including ZIP code), and phone number. The IRS will contact your employer or payer and request the missing form. The IRS will also send you a Form 4852. If you don't receive the missing form in sufficient time to file your income tax return timely, you may use the Form 4852 that the IRS sent you to file with your return.

1 Name(s) shown on return Daniel D Benhan		2 Your social security number 	
3 Address 			
4 Enter year in space provided and check one box. For the tax year ending December 31, 2020 I have been unable to obtain (or have received an incorrect) ☒ Form W-2 OR ☐ Form 1099-R. I have notified the IRS of this fact. The amounts shown on line 7 or line 8 are my best estimates for all wages or payments made to me and tax withheld by my employer or payer named on line 5.			
5 Employer's or payer's name, address, and ZIP code General Motors LLC		6 Employer's or payer's TIN (if known) 	
7 Form W-2. Enter wages, tips, other compensation, and taxes withheld.			
a Wages, tips, and other compensation	-0-	f State income tax withheld	3832
b Social security wages	-0-	(Name of state)	
c Medicare wages and tips	-0-	g Local income tax withheld	
d Social security tips	-0-	(Name of locality)	
e Federal income tax withheld	10259	h Social security tax withheld	6968
		i Medicare tax withheld	1630
8 Form 1099-R. Enter distributions from pensions, annuities, retirement or profit-sharing plans, IRAs, insurance contracts, etc.			
a Gross distribution		f Federal income tax withheld	
b Taxable amount		g State income tax withheld	
c Taxable amount not determined	☐	(Name of state)	
d Total distribution	☐	h Local income tax withheld	
e Capital gain (included on line 8b)		(Name of locality)	
		i Employee contributions	
		j Distribution codes	
9 How did you determine the amounts on lines 7 and 8 above? Party identified as Payer provided a W-2 that erroneously alleges payment of an IRC Sec. 3121 or 3401 transactions, as corrected in 7 (a) - (d) hereinabove, that is hereby disputed. I deny that said Payer and I had/have any IRC Sec. 3121 or 3401 transactions. 7 (e) - (i) were correct.			
10 Explain your efforts to obtain Form W-2, Form 1099-R (original or corrected), or Form W-2c, Corrected Wage and Tax Statement.			

General Instructions

Section references are to the Internal Revenue Code.

Future developments. For the latest information about developments related to Form 4852, such as legislation enacted after it was published, go to www.irs.gov/Form4852.

Purpose of form. Form 4852 serves as a substitute for Forms W-2, W-2c, and 1099-R (original or corrected) and is completed by you or your representatives when (a) your employer or payer doesn't issue you a Form W-2 or Form 1099-R, or (b) an employer or payer has issued an incorrect Form W-2 or Form 1099-R. Attach this form to the back of your income tax return before any supporting forms or schedules.

You should always attempt to get your Form W-2, Form W-2c, or Form 1099-R (original or corrected) from your employer or payer before contacting the IRS or filing Form 4852. If you don't receive the missing or corrected form from your employer or payer by the end of February, you may call the IRS at 800-829-1040 for assistance. You must provide your name, address (including ZIP code), phone number, social security number, and dates of employment. You must also provide your employer's or payer's name, address (including ZIP code), and phone number. The IRS will contact your employer or payer and request the missing form. The IRS will also send you a Form 4852. If you don't receive the missing form in sufficient time to file your income tax return timely, you may use the Form 4852 that the IRS sent you.