

**Arthur Langer CPA PC  
52 Clubhouse Circle  
Melville, NY 11747  
516-702-3002**

January 28, 2023

**CONFIDENTIAL**

CAROLYN SIMON  
71 TONJES ROAD  
CALLICOON, NY 12723

Dear CAROLYN:

We have prepared the following returns from information provided by you without verification or audit:

U.S. Individual Income Tax Return (Form 1040)  
New York Resident Income Tax Return (Form IT-201)

We suggest that you examine these returns carefully to fully acquaint yourself with all items contained therein to ensure that there are no omissions or misstatements. Attached are instructions for signing and filing each return. Please follow those instructions carefully.

Also enclosed is any material you furnished for use in preparing the returns. If the returns are examined, requests may be made for supporting documentation. Therefore, we recommend that you retain all pertinent records for at least seven years.

This office is committed to using safeguards that protect your information from data theft. To further protect your identity, you can also take steps to stop thieves. IRS Publication 4524 ([www.irs.gov/pub/irs-pdf/p4524.pdf](http://www.irs.gov/pub/irs-pdf/p4524.pdf)) outlines simple steps that help you keep your computer secure, avoid phishing and malware, and protect your personal information.

In order that we may properly advise you of tax considerations, please keep us informed of any significant changes in your financial affairs or of any correspondence received from taxing authorities.

If you have any questions or if we can be of assistance in any way, please do not hesitate to call.

Sincerely,

Arthur Langer CPA PC

Filing Instructions



FILE COPY

Form IT-201 - New York Income Tax Return

Taxable Year Ended December 31, 2022

**Name:** CAROLYN SIMON

**Date Due:** April 18, 2023

**Remittance:** None is required. No amount is due or overpaid.

**Signature:** Sign and date Form TR-579-IT, New York State E-file Signature Authorization. Return it as soon as possible to:

Arthur Langer CPA PC  
52 Clubhouse Circle  
Melville, NY 11747

**Other:** Your return is being filed electronically. Do not mail Form IT-201.



Your Social Security number
149463469

**Federal income and adjustments**

- 1 Wages, salaries, tips, etc.
- 2 Taxable interest income
- 3 Ordinary dividends
- 4 Taxable refunds, credits, or offsets of state and local income taxes (also enter on line 25)
- 5 Alimony received
- 6 Business income or loss (submit a copy of federal Schedule C, Form 1040)
- 7 Capital gain or loss (if required, submit a copy of federal Schedule D, Form 1040)
- 8 Other gains or losses (submit a copy of federal Form 4797)
- 9 Taxable amount of IRA distributions. If received as a beneficiary, mark an **X** in the box
- 10 Taxable amount of pensions and annuities. If received as a beneficiary, mark an **X** in the box
- 11 Rental real estate, royalties, partnerships, S corporations, trusts, etc. (submit copy of federal Schedule E, Form 1040)
  
- 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 *Identify:* 16 .00
- 17 Add lines 1 through 11 and 13 through 16 17 7540 .00
- 18 Total federal adjustments to income *Identify:* 18 .00
- 19 Federal adjusted gross income (subtract line 18 from line 17) 19 7540 .00
- 19a Recomputed federal adjusted gross income (see Line 19a worksheet) 19a 7540 .00

**New York additions**

- 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 21 .00
- 22 New York's 529 college savings program distributions 22 .00
- 23 Other (Form IT-225, line 9) 23 .00
- 24 Add lines 19a through 23 24 7540 .00

**New York subtractions**

- 25 Taxable refunds, credits, or offsets of state & local income taxes (from line 4) 25 .00
- 26 Pensions of NYS and local governments and the federal government 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 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 7540 .00

**Standard deduction or itemized deduction**

34 Enter your **standard deduction** or your **itemized deduction** (from Form IT-196)  
 Mark an **X** in the appropriate box:  **Standard** - or -  **Itemized**

35 Subtract line 34 from line 33 (if line 34 is more than line 33, leave blank)

36 Dependent exemptions (enter the number of dependents listed in item H)

37 Taxable income (subtract line 36 from line 35)

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Whole dollars only

1	7540 .00
2	.00
3	.00
4	.00
5	.00
6	.00
7	.00
8	.00
9	.00
10	.00
11	.00

12	.00
13	.00
14	.00
15	.00
16	.00
17	7540 .00
18	.00
19	7540 .00
19a	7540 .00



25	.00
26	.00
27	.00
28	.00
29	.00
30	.00
31	.00

32	.00
33	7540 .00

34	8000 .00
35	.00
36	000.00
37	.00

NO HANDWRITTEN ENTRIES, OTHER THAN SIGNATURE, ON THIS FORM

## Tax computation, credits, and other taxes

38 Taxable income (from line 37 on page 2)

38 .00

39 NYS tax on line 38 amount

39 .00

40 NYS household credit

40 30.00

41 Resident credit

41 .00

42 Other NYS nonrefundable credits (Form IT-201-ATT, line 7)

42 .00

43 Add lines 40, 41, and 42

43 30.00

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 .00

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

47 NYC taxable income

47 .00

47a NYC resident tax on line 47 amount

47a .00

48 NYC household credit

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 .00

54b MCTMT

55 .00

55 Yonkers resident income tax surcharge

56 .00

56 Yonkers nonresident earnings tax (Form Y-203)

57 .00

57 Part-year Yonkers resident income tax surcharge (Form IT-360.1)

58 Total New York City and Yonkers taxes / surcharges and MCTMT (add lines 54 and 54b through 57) .00

58 .00

59 Sales or use tax (do not leave blank)

59 0.00

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 .00

See instructions to compute New York City and Yonkers taxes, credits, and surcharges, and MCTMT.



62 Enter amount from line 61

Your Social Security number
149463469

62

.00

**Payments and refundable credits**

63 Empire State child credit	.00
64 NYS/NYC child and dependent care credit	.00
65 NYS earned income credit (EIC)	.00
66 NYS noncustodial parent EIC	.00
67 Real property tax credit	.00
68 College tuition credit	.00
69 NYC school tax credit (fixed amount) (also complete F on page 1)	.00
69a NYC school tax credit (rate reduction amount)	.00
70 NYC earned income credit	.00
70a This line intentionally left blank	.00
71 Other refundable credits (Form IT-201-ATT, line 18)	.00
72 Total New York State tax withheld	.00
73 Total New York City tax withheld	.00
74 Total Yonkers tax withheld	.00
75 Total estimated tax payments and amount paid with Form IT-370	.00
<b>76 Total payments (add lines 63 through 75)</b>	<b>.00</b>



If applicable, complete Form(s) IT-2 and/or IT-1099-R and submit them with your return.

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

**Your refund, amount you owe, and account information**

77 Amount overpaid (if line 76 is more than line 62, subtract line 62 from line 76)	.00
78 Amount of line 77 available for refund (subtract line 79 from line 77)	.00
TIP: Use this amount to check your refund status online.	
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)	.00

78b Total refund after NYS 529 account deposit (subtract line 78a from line 78)

**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.

**See instructions for payment options.**

78a	.00
78b	.00

79 Amount of line 77 that you want applied to your 2023 estimated tax (see instructions)	.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 <input type="checkbox"/> 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.	.00
81 Estimated tax penalty (include this amount in line 80 or reduce the overpayment on line 77)	.00
82 Other penalties and interest	.00

**See instructions for the proper assembly of your return.**

83 Account information for direct deposit or electronic funds withdrawal. 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 <input type="checkbox"/>	<input type="checkbox"/> Personal checking - or - <input type="checkbox"/> Personal savings - or - <input type="checkbox"/> Business checking - or - <input type="checkbox"/> Business savings
83a Account type: <input type="checkbox"/> Personal checking - or - <input type="checkbox"/> Personal savings - or - <input type="checkbox"/> Business checking - or - <input type="checkbox"/> Business savings	83c Account number
83b Routing number	

84 Electronic funds withdrawal Date Amount .00

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

<b>▼ Paid preparer must complete▼</b> (see instructions)		Preparer's NYTPRIN	NYTPRIN excl. code	03
Preparer's signature Arthur Langer CPA	Preparer's printed name Arthur Langer CPA			
Firm's name (or yours, if self-employed) Arthur Langer CPA PC		Preparer's PTIN or SSN P01396073		
Address 52 Clubhouse Circle Melville NY 11747		Employer identification number 814277329		
Email:		Date 01282023		

<b>▼ Taxpayer(s) must sign here▼</b>			
Your signature			
Your occupation CLERICAL			
Spouse's signature and occupation (if joint return)			
Date	Daytime phone #		
Email:			

See instructions for where to mail your return.

201004221022



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Name Taxpayer	CAROLYN	SIMON	Taxpayer Identification Number 149-46-3469
Spouse			106-50-1158

**Line 19a worksheet**

1. Federal adjusted gross income as reported (form IT-201, line 19) ..... 1. 7,540.
2. Total addition adjustments (Form IT-558, line 9) ..... 2. \_\_\_\_\_
3. Add lines 1 and 2 ..... 3. 7,540.
4. Total subtraction adjustments (Form IT-558, line 18) ..... 4. \_\_\_\_\_
5. Recomputed federal adjusted gross income, line 3 less line 4 ..... 5. 7,540.