

**UPPER-TIER PASS-THROUGH ENTITY  
TAX CREDIT ALLOCATION**

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➤ Attach to Form N-40

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Place an X if:  Supplement to Part II Only

Name as shown on tax return NAME AS SHOWN ON TAX RETURN XXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Federal Employer I.D. No. (FEIN) 99-9999999
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<b>Part I PTE TAX CREDIT RECEIVED FROM ELECTING PTE INFORMATION</b>	
Electing PTE Name ELECTING PTE OR UPPER TIER PTE NAME XXXXXXXXXXXXXXXXXXXXX	FEIN 99-9999999
1. Total PTE tax credit amount received from the electing PTE.....	1 999999999999

<b>Part II SCHEDULE OF BENEFICIARIES</b>	
1. Total number of your beneficiaries reported on this form.....	1 999999999999
2. Total PTE tax credit amount for all beneficiaries reported on this form.....	2 999999999999

A	Beneficiary Name QUALIFIED MEMBER NAME A XXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<input checked="" type="checkbox"/> FEIN <input checked="" type="checkbox"/> SSN	999999999999
	Distributive share of the PTE tax credit.....	A	999999999999
B	Beneficiary Name QUALIFIED MEMBER NAME B XXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<input checked="" type="checkbox"/> FEIN <input checked="" type="checkbox"/> SSN	999999999999
	Distributive share of the PTE tax credit.....	B	999999999999
C	Beneficiary Name QUALIFIED MEMBER NAME C XXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<input checked="" type="checkbox"/> FEIN <input checked="" type="checkbox"/> SSN	999999999999
	Distributive share of the PTE tax credit.....	C	999999999999
D	Beneficiary Name QUALIFIED MEMBER NAME D XXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<input checked="" type="checkbox"/> FEIN <input checked="" type="checkbox"/> SSN	999999999999
	Distributive share of the PTE tax credit.....	D	999999999999
E	Beneficiary Name QUALIFIED MEMBER NAME E XXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<input checked="" type="checkbox"/> FEIN <input checked="" type="checkbox"/> SSN	999999999999
	Distributive share of the PTE tax credit.....	E	999999999999
F	Beneficiary Name QUALIFIED MEMBER NAME F XXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<input checked="" type="checkbox"/> FEIN <input checked="" type="checkbox"/> SSN	999999999999
	Distributive share of the PTE tax credit.....	F	999999999999
G	Beneficiary Name QUALIFIED MEMBER NAME G XXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<input checked="" type="checkbox"/> FEIN <input checked="" type="checkbox"/> SSN	999999999999
	Distributive share of the PTE tax credit.....	G	999999999999
H	Beneficiary Name QUALIFIED MEMBER NAME H XXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<input checked="" type="checkbox"/> FEIN <input checked="" type="checkbox"/> SSN	999999999999
	Distributive share of the PTE tax credit.....	H	999999999999

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Name as shown on tax return NAME AS SHOWN ON TAX RETURN XXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Federal Employer I.D. No. (FEIN) 99-9999999
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<b>Part II SCHEDULE OF BENEFICIARIES - continued</b>			
<b>I</b>	Beneficiary Name QUALIFIED MEMBER NAME I XXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<input checked="" type="checkbox"/> FEIN <input checked="" type="checkbox"/> SSN	9999999999
	Distributive share of the PTE tax credit.....	<b>I</b>	999999999999
<b>J</b>	Beneficiary Name QUALIFIED MEMBER NAME J XXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<input checked="" type="checkbox"/> FEIN <input checked="" type="checkbox"/> SSN	9999999999
	Distributive share of the PTE tax credit.....	<b>J</b>	999999999999
<b>K</b>	Beneficiary Name QUALIFIED MEMBER NAME K XXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<input checked="" type="checkbox"/> FEIN <input checked="" type="checkbox"/> SSN	9999999999
	Distributive share of the PTE tax credit.....	<b>K</b>	999999999999
<b>L</b>	Beneficiary Name QUALIFIED MEMBER NAME L XXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<input checked="" type="checkbox"/> FEIN <input checked="" type="checkbox"/> SSN	9999999999
	Distributive share of the PTE tax credit.....	<b>L</b>	999999999999
<b>M</b>	Beneficiary Name QUALIFIED MEMBER NAME M XXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<input checked="" type="checkbox"/> FEIN <input checked="" type="checkbox"/> SSN	9999999999
	Distributive share of the PTE tax credit.....	<b>M</b>	999999999999
<b>N</b>	Beneficiary Name QUALIFIED MEMBER NAME N XXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<input checked="" type="checkbox"/> FEIN <input checked="" type="checkbox"/> SSN	9999999999
	Distributive share of the PTE tax credit.....	<b>N</b>	999999999999
<b>O</b>	Beneficiary Name QUALIFIED MEMBER NAME O XXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<input checked="" type="checkbox"/> FEIN <input checked="" type="checkbox"/> SSN	9999999999
	Distributive share of the PTE tax credit.....	<b>O</b>	999999999999
<b>P</b>	Beneficiary Name QUALIFIED MEMBER NAME P XXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<input checked="" type="checkbox"/> FEIN <input checked="" type="checkbox"/> SSN	9999999999
	Distributive share of the PTE tax credit.....	<b>P</b>	999999999999
<b>Q</b>	Beneficiary Name QUALIFIED MEMBER NAME Q XXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<input checked="" type="checkbox"/> FEIN <input checked="" type="checkbox"/> SSN	9999999999
	Distributive share of the PTE tax credit.....	<b>Q</b>	999999999999
<b>R</b>	Beneficiary Name QUALIFIED MEMBER NAME R XXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<input checked="" type="checkbox"/> FEIN <input checked="" type="checkbox"/> SSN	9999999999
	Distributive share of the PTE tax credit.....	<b>R</b>	999999999999
<b>S</b>	Beneficiary Name QUALIFIED MEMBER NAME S XXXXXXXXXXXXXXXXXXXXXXXXXXXXX	<input checked="" type="checkbox"/> FEIN <input checked="" type="checkbox"/> SSN	9999999999
	Distributive share of the PTE tax credit.....	<b>S</b>	999999999999