

UPPER-TIER PASS-THROUGH ENTITY TAX CREDIT ALLOCATION

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➤ Attach to Form N-40

SCHPTEU_I 2024A 01 VID01

Check if: Supplement to Part II Only

Name as shown on tax return	Federal Employer I.D. No. (FEIN)
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Part I PTE TAX CREDIT RECEIVED FROM ELECTING PTE INFORMATION	
Electing PTE Name	FEIN
1. Total PTE tax credit amount received from the electing PTE.....	1

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

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



SCHPTEU_I 2024A 02 VID01

Name as shown on tax return	Federal Employer I.D. No. (FEIN)
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Part II SCHEDULE OF BENEFICIARIES - continued			
I	Beneficiary Name	<input type="checkbox"/> FEIN <input type="checkbox"/> SSN	
	Distributive share of the PTE tax credit.....	I	
J	Beneficiary Name	<input type="checkbox"/> FEIN <input type="checkbox"/> SSN	
	Distributive share of the PTE tax credit.....	J	
K	Beneficiary Name	<input type="checkbox"/> FEIN <input type="checkbox"/> SSN	
	Distributive share of the PTE tax credit.....	K	
L	Beneficiary Name	<input type="checkbox"/> FEIN <input type="checkbox"/> SSN	
	Distributive share of the PTE tax credit.....	L	
M	Beneficiary Name	<input type="checkbox"/> FEIN <input type="checkbox"/> SSN	
	Distributive share of the PTE tax credit.....	M	
N	Beneficiary Name	<input type="checkbox"/> FEIN <input type="checkbox"/> SSN	
	Distributive share of the PTE tax credit.....	N	
O	Beneficiary Name	<input type="checkbox"/> FEIN <input type="checkbox"/> SSN	
	Distributive share of the PTE tax credit.....	O	
P	Beneficiary Name	<input type="checkbox"/> FEIN <input type="checkbox"/> SSN	
	Distributive share of the PTE tax credit.....	P	
Q	Beneficiary Name	<input type="checkbox"/> FEIN <input type="checkbox"/> SSN	
	Distributive share of the PTE tax credit.....	Q	
R	Beneficiary Name	<input type="checkbox"/> FEIN <input type="checkbox"/> SSN	
	Distributive share of the PTE tax credit.....	R	
S	Beneficiary Name	<input type="checkbox"/> FEIN <input type="checkbox"/> SSN	
	Distributive share of the PTE tax credit.....	S	