



Reconciliation of Estimated Tax Account for Individuals

Name as shown on your New York State income tax return			Tax year:	
Mailing address (number and street or PO Box)			Social Security number	
City, village, or post office	State	ZIP code	Fax number for reply	

1	Enter the amount in your estimated tax account as provided by the Tax Department (see instructions)				1.		
	Date	Document locator number	Confirmation number	Amount			
2	Credit from previous year...				2.		
3	Payment				3.		
4	Payment				4.		
5	Payment				5.		
6	Payment				6.		
7	Estimated tax paid with Form IT-2663, IT-2664, or IT-2658				7.		
8	Add lines 2 through 7 (enter here and see instructions)				8.		

Instructions

Use this form **only** if your records disagree with the estimated tax amount shown in your Individual Online Services account. For more information, visit www.tax.ny.gov (search: *estimated*). Fax or mail your completed form to the Account Reconciliation Unit as follows:

Fax to: 518-435-8658 or **mail to:**
NYS TAX DEPARTMENT
ESTIMATED TAX UNIT
W A HARRIMAN CAMPUS
ALBANY NY 12227-0822

To allow for proper crediting, be sure to include the *document locator number* or *confirmation number* for each payment on lines 3 through 6.

Enter the name and Social Security number as they appear on your New York State income tax return.

Line instructions

Line 1: Married taxpayers—If you had an overpayment from the previous year applied to your current estimated tax account or made any payment with Form IT-370, we established a separate estimated tax account for each spouse. To reconcile the amounts on Form IT-2105.1, be sure to check both spouses' estimated tax accounts. If you file a joint New York State income tax return, we will credit the balances of both accounts to your joint income tax return. If you file separately, we will credit the balance of each spouse's account to their respective returns only.

Line 2: Enter the amount of your previous tax overpayment that was applied to your current estimated tax account, as finally determined. If we adjusted your previous tax return, the amount applied may differ from the amount we actually credited to your current estimated tax account. If so, the Tax Department sent you a notice of adjusted credit to advise you of the proper amount.

Lines 3 through 6: Enter the date, document locator number or confirmation number, and amount of each payment you made. The *document locator number* is a 12-character entry beginning with *PT*, and it appears on the back of your canceled check or money order. If you paid by money order, contact the issuing agent for this information. The *confirmation number* is a seven-digit or 12-character number. If you paid by credit card, your credit card

service provider delivered your confirmation number when you paid. If you paid by direct debit from your bank account on our website, we provided your confirmation number onscreen when you paid and by email in your confirmation notice.

If you do not have your credit card confirmation number, contact your credit card service provider for this information.

Line 7: Enter the amount of estimated tax you paid with Form IT-2663, *Nonresident Real Property Estimated Income Tax Payment Form*, Form IT-2664, *Nonresident Cooperative Unit Estimated Income Tax Payment Form*, and any amount of estimated tax paid on your behalf with Form IT-2658, *Report of Estimated Tax for Nonresident Individual Partners and Shareholders*. If a partnership or S corporation paid estimated tax on your behalf with Form IT-2658, include the partnership's or S corporation's federal EIN or a copy of the statement provided by the partnership or S corporation showing the estimated tax paid for you. If you need more space, send an attachment with the required payment information.

Line 8

If line 8 is the **same** as line 1, your records agree with ours. Claim the line 1 amount as estimated tax paid on Form IT-201 or Form IT-203. Do not send this form to the Tax Department.

If line 8 is **different** from line 1, fax or mail this completed form **immediately** as instructed above. We will review our records and reply to you in time for you to file your return, provided we receive your Form IT-2105.1 by April 1. If you send this form **after** April 1, we will still respond, however, you may need to request an automatic extension of time to file and pay any amount due if you do not receive our response in time to file by the due date for your return.

Privacy notification

See our website or Publication 54, *Privacy Notification*.