

North Carolina Department of Revenue

Historic Rehabilitation Credits

Article 3D

Returns Processed during Calendar Year 2013

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Income-Producing Property (237 Taxpayers)		
Albright, Michael E.	400,000	16,000
Alston, Terry R.	1,500	1,000
Anderson Jr., Dewayne H.	0	13,349
Anderson, Richard A.	8,110	1,622
Anderson, Thomas F.	172,679	34,535
Andrews, Robert V.	21,952	4,391
Andrews, William C.	21,932	4,390
Arangure Garcia, Isabel	0	1,111
Arneson, Sarah M.	263,297	10,532
Ashby, Steven M.	0	3,210
Baker, David L.	0	41,575
Balsley III, Jacob B.	0	2,872
Bank of America Corp.	0	827,273
Beach, Jeffrey L.	0	37,240
Beal, Shawn E.	235	235
Beck, Mark D.	0	214,188
Bee, George A.	0	6,696
Bellinger, Dwight A.	0	3,869
Belton, Benjamin G.	0	18,997
Berghausen, Alexander	0	10,320
Bierman, James L.	0	12,953
Blakeslee, Stanton E.	0	9,577
Bland, William	0	65,814
Blankinship, Mark R.	0	3,072
Blankinship, Matthew E.	0	2,952
Booker, Ericson W.	1,046,124	41,845
Brady, Stephen H.	0	4,581
Bridges, David L.	40	1
Brim Sammy, J.	0	118,797
Brodey, Benjamin B.	449,604	17,984

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Brooks III, Fred G.	274,715	10,989
Brooks, William R.	0	26,517
Brown, David L.	284,970	56,994
Brown, David N.	170,982	6,839
Brown, George L.	0	4,263
Browne III, Joseph M.	0	5,625
Bryan, Harrel D.	87,252	3,490
Buff, Mark R.	0	2,190
Byrum, Walter G.	0	1,680
Carolina Bank	0	181
Carr, Stephen M.	0	15,647
Cartwright, Stephanie C.	399,190	15,968
Chadowitz, Jack	142,740	5,710
Citizens Bank Trust	0	60
Clark, Wendy K.	447,431	17,897
Clayton, Charles A.	0	1,163
Cline, James T.	0	43,742
Collett III, Sterling R.	0	3,292
Coltrane Jr., Joseph M.	13,443	4,033
Coltrane, J. Max	16,803	1,008
Coonley, Kip D.	0	4,400
Corona Torres, Adriana	520	520
Cox, Steven W.	11,270	11,270
Crain, Jason R.	0	9,577
Crawford, Jon C.	0	7,400
Davis, David M.	1,500	100
Delpapa Jr., James B.	55,164	4,413
Dick, Jon C.	13,154	6,605
Dierkes, Nicholas J.	113,988	22,798
Dills, Troy L.	10,000	10,000
Doub Jr., Joseph L.	0	8,365
Eckert, David J.	51,765	2,071
Elder, Tiffany	135,097	2,590
Elenz, Nolan D.	346,106	13,844
Escobar Paz, Jesus	1,236	1,236
Fanning, Paul A.	0	65,813
Fee, Michael G.	65,000	2,600
First Citizens Bancshares, Inc.	0	2,949

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Fisher, Issac E.	0	4,536
Flack III, Charles Z.	0	4,581
Flack, Thomas C.	0	4,581
Fowle Jr., David T.	82,282	3,291
Freiberger, John J.	0	17,448
Friedlein, David H.	146,655	5,866
Friesen, Jonathan E.	0	4,714
Fulenwider, Charles M.	14,746	590
Gardner, Robert W.	0	5,400
Gateway Management Services, Ltd.	855,000	34,200
Gennosa, Thomas J.	0	936
Giddings, Rhett B.	0	4,581
Gladin-Kramer, Jessica K.	108,951	4,358
Graham, Brooks G.	0	15,546
Greer, Myron S.	0	526
Griffin III, Cornelius	0	16,966
Guy, Margaret	0	289
Hakan, Michael J.	0	1,935
Harmon, Jerald S.	263,297	10,532
Hatem, George M.	71,875	2,875
Hatem, Gregory P.	332,225	13,289
Healy, Shannon M.	138,906	5,556
Hedgepeth, Michael T.	8,000	320
Hester, J. T.	0	52,233
Hill III, Dan W.	0	22,696
Hill III, Andrew J.	0	1,620
Hill, Cynthia L.	0	18,000
Holding, James B.	0	2,654
Hollingsworth, Daniel B.	0	11,403
Hoyt, Richard L.	0	7,831
Hube, Stephen K.	0	738
Hutchins, Charles H.	0	31,820
Ingram, Charles M.	0	8,042
Israel, Erik S.	267	267
Jasper, Stacy L.	1,071,584	42,863
Jeter, Andrew S.	0	10,246
Johnson, Benjamin C.	0	9,183

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Johnson, Sherman L.	736	736
Johnson, Vincent L.	0	31
Johnson, William C.	0	6,940
Jones, David V.	20,700	2,000
Jones, Veronica B.	2,158	1,566
Joyce, Alexia M.	0	7,120
Keen, Harold T.	103,832	4,153
Kelly, Matthew R.	683,137	27,325
Keul, Norman C.	0	2,570
Kilian, Michael W.	0	6,507
Kirkland Jr., William A.	0	12,389
Kittrell, Bennett	0	103
Kittrell, Robert	0	103
Kohler, Gretta D.	0	1,814
Lambeth, John E.	93,454	3,738
Lattimore, John B.	0	2,774
Lawhorn, Kenneth P.	0	7,429
Lawson, Dennis S.	0	32,684
Leatherwood, Michael S.	37,412	1,496
Lee, Jamie S.	0	29,286
Leland, William J.	68,783	2,751
Lewallen, Deborah S.	0	6,238
Light, Aubrey A.	0	1,920
Lindley, Kevin G.	19,960	3,992
Lindsay, James W.	0	1,153
Lowry, Stephen H.	0	18,130
Lynn, Freddie L.	400	200
MacIntosh, Jeffrey W.	215,205	37,499
Makgill, Diane C.	0	2,159
Mantero, Leanne E.	0	3,978
Matthews, Hubert	0	2,456
McCaughan III, Ralph L.	57,230	10,290
McDonald, Ralph	0	2,867
McEwan Robert	0	5,929
McLaughlin, Dwight G.	0	25,435
McMahill, Albert R.	0	9,600
McNeill, Robert B.	0	2,806
McRae, Willie L.	0	31

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
McSwain, Darrell H.	875	875
Measurement, Inc.	0	253,290
Mellette, Merle C.	815	815
Merten, Stacy A.	0	2,926
Metcalf, Michael D.	34,250	1,370
Michelsen, Sean T.	140,499	5,620
Michelsen, Warren J.	140,499	5,620
Miles, Joy T.	266	266
Miller, William B.	5,801	5,500
Mirman, Steve A.	25,000	1,500
Molleur, Peter A.	0	4,064
Moody, Darren W.	141,906	5,676
Morgan, Nathan J.	855	855
Mosier, Dale M.	193,214	7,729
Naysmith, Donald R.	1,050,000	42,000
Newkirk, Charles C.	285	285
North State Bank	0	30
Norwood, Carla M.	229,779	18,260
Orrison, William G.	14,747	590
Owens, Jerry	122,898	4,916
Pacheco Antonio, Isidro	0	325
Pahl, Thomas H.	0	11,187
Parnell II, Jerome P.	0	22,611
Pearson, Michael C.	0	8,078
Plumer, Stephen W.	0	4,774
Porter Jr., Thomas J.	232,847	3,259
Princiotta, Thomas M.	136,721	5,469
Pugh, Jimmie C.	300	300
Radcliffe, Barry A.	0	39,140
Ramsey, Jerry D.	0	4,197
Ransdell III, William G.	11,139	446
Rasmussen, Dennis J.	0	1,656
Rauschenbach, Richard A.	0	2,641
Reardon, Thomas R.	28,918	1,157
Rees, Floyd E.	122,559	4,902
Rees, Majorie M.	0	4,688
Reynolds, Debby L.	0	88,173
Reynolds, Joshua E.	81,000	16,200

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Roberts Jr., Gary H.	19,500	780
Robinson III, Wilbur H.	0	1,219
Roemer, Victoria	0	8,254
Rowan Investment Company, Inc.	91,696	18,339
Ryan, Jason A.	0	19,697
Ryding, Jeffrey L.	17,942	718
Sanderson, Stuart S.	0	5,053
Saye, Stephen A.	0	27,027
Scarborough, David C.	373,654	14,946
Schafer, Gerald S.	0	12,429
Scharf, Matthew	82	3
Schneider Electric USA, Inc.	0	148,106
Sharrow, George R.	0	26,029
Shearin, Ronald V.	0	6,181
Sheffield, Charles J.	28,480	1,139
Shope, Richard I.	0	880
Smathers, Patrick U.	23,121	925
Smith, Frank S.	0	28,535
Solomon, Sheryl J.	0	2,169
Spainhour, Richard A.	0	2,616
Starkey, Brian H.	62,986	2,519
Steinman, Charles T.	0	15,655
Steinman, Todd A.	0	27,396
Stevens, Toni W.	71,686	21,506
Stewart, Andrew M.	6	1
Suer, Lucas J.	21,689	10,868
Sui, Wen	500	400
Summers, Craig	250	100
Taff, Jehu T.	0	14,669
Taylor, Fletcher	0	1,524
Taylor, John W.	1,588	1,588
Taylor, Merritt	2,199	88
The Sherwin-Williams Company	0	483,830
Thompson, Bennett R.	0	42
Thompson, Phillip M.	500	500
Tweeten, Rolf A.	0	8,337
Tyrance, Annie	833	833
United Parcel Service, Inc.	0	1,719,537

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Wallace III, Leo	2,927,986	117,119
Warasila, John L.	32,392	32,392
Watkins, William R.	0	4,553
Webb Jr., Joseph M.	1,000,000	272
Wellington Holding, Ltd.	825,170	66,014
Wells, Jo B.	0	28,087
Wells, Samuel	0	28,087
Westford, Stephanie Y.	40,000	5,000
Whaley, John A.	0	84,075
Whitney, David J.	55,163	4,413
Williams, Norman C.	452,192	18,088
Williamson, Matthew D.	7,500	1,500
Woodard, Charles D.	0	15,954
Woodruff, Dylan W.	9,291	9,291
Woolard, Earnestine W.	100	100
Yoder, Michael D.	246,472	34,139
Zauscher, Stefan	0	4,389
Zinner, Clifford T.	0	44,567
Total Credits Taken for Income-Producing Property	18,452,745	6,319,398

C-Corporations that take income tax credits must reduce the amount of credit in accordance with G. S. 105-130.5(a)(10). This adjustment decreases the total credits taken from the amount shown above by \$245,213.

Non-Income-Producing Property (550 Taxpayers)

Abernethy III, William B.	0	16,697
Abram, Lynn M.	138,073	8,284
Adams, Geoffrey W.	0	12,600
Adams, Gregory B.	0	12,211
Alchediak, James	0	2,117
Ali, Robin R.	0	7,588
Allers, John D.	0	4,336
Alphin, William J.	0	6,484
Anderson, William E.	76,500	4,590
Andrews, Peter V.	63,400	7,608
Ankerson, Matthew D.	0	8,599

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Araujo, Roshelle	0	6,500
Armento, Anthony F.	187,310	11,239
Arneson, Sarah M.	175,533	10,532
Aspnes, David E.	225,000	15,650
Attride, Jennifer H.	0	2,857
Autry, Larry K.	0	1,680
Azar, Philip J.	0	2,997
Babson, John C.	102,000	6,120
Baldwin, David P.	0	1,070
Baldwin, Samuel L.	0	1,606
Barnes, Gregory B.	0	4,894
Barnum, Nancy L.	290,000	45,250
Bastian, Donald M.	53,350	3,201
Baugher Jr., John L.	1,000	1,000
Beacham, Carl J.	0	10,249
Beck Jr., James L.	0	2,500
Beck, Darin W.	0	5,000
Becker, Daniel L.	114,981	6,899
Beckman, Theresa M.	0	1,639
Bennett, Becky J.	31,850	1,911
Bergstone, Mary G.	0	2,984
Bernstein, Joshua E.	0	11,760
Berry, Geoffrey C.	0	10,932
Best, Joan S.	82,520	16,504
Betteridge, Timothy	0	6,900
Bible, Stewart A.	0	8,634
Bickford Jr., David M.	87,356	5,242
Bishir, John W.	0	2,970
Bittle, Felicia A.	45,000	13,500
Blazevich, Martin J.	0	8,820
Bloomfield, Peter	0	3,987
Boeker, Thomas W.	0	14,250
Boner, Justin R.	0	2,385
Booker, Matthew	36,634	4,580
Boomer, Timothy F.	0	4,485
Borre, James	132,845	7,971
Bortiri, Esteban	0	8,342
Bowen, Jeffrey L.	0	38,434

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Boyette, Marion D.	0	11,659
Boyle, William E.	0	2,970
Bray, James C.	0	13,923
Briggs, Daniel	0	10,770
Broadfoot, John W.	53,301	3,198
Brockmann, Todd C.	0	48,934
Brooks, Helen E.	0	48,203
Browder, Matthew D.	520,000	31,200
Brown, Neil N.	0	26,476
Brown, William J.	0	726
Broyles, James C.	0	5,520
Brunette, Bryan L.	0	3,413
Bryan, John	0	1,827
Bucar, Elizabeth M.	0	1,894
Bullard Jr., Maidson E.	0	3,567
Burckley, William J.	195,000	39,000
Burry, Harriet L.	0	16,033
Butler, Brian P.	0	12,000
Cagle, William J.	0	4,316
Campanella, Thomas J.	0	4,600
Campbell, Colin M.	0	11,646
Campbell, Douglas A.	0	1,602
Capps, Jordan S.	0	5,100
Carlson III, James S.	250	50
Carpenter, Jeffery H.	0	5,910
Carreker, Justin M.	0	2,751
Carroll, Scott	0	3,750
Carter, Adrian M.	0	7,500
Chamberlain, John C.	4,500	1,350
Cherry, Timothy L.	0	8,463
Chiarello, Debra S.	206,328	12,380
Chilkoti, Ashutosh	0	4,740
Clark, William S.	41,700	2,502
Coffey, Joseph M.	31,720	6,344
Cokendolpher, Bradley J.	0	10,362
Cole Jr., William P.	0	3,494
Cole, Glenn	241,729	14,504
Collie, Jeffrey B.	0	3,600

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Collie, Peyton E.	38,225	2,294
Coltrane, Jonathan L.	0	3,000
Cooke III, James D.	107,723	21,545
Cook-Parsons, Sally	0	1,590
Cordell, Jill C.	181,656	10,899
Cormier, Trenton J.	0	8,008
Costello, Terry W.	0	18,313
Couch, Raymond S.	174,017	1,160
Cowell IV, John F.	750,000	45,000
Cowhig, James M.	0	9,277
Cox, Earl C.	0	3,648
Stricklin, Jill S.	0	23,579
Craft, Daniel C.	0	1,954
Crandall, Russell C.	0	5,000
Creamer, Marvin C.	0	16,119
Creed, Danny R.	3,187	3,187
Crockett, David F.	0	3,911
Crowder, Matthew S.	0	9,085
Crum, Mark D.	43,311	2,599
Cummings, James J.	0	6,692
Cummins, Barry K.	0	84,900
Cummins, Bradley K.	0	84,900
Cupido, Christine A.	0	3,567
Daly, Virginia T.	25,000	5,206
Daniels, John L.	8,320	1,664
Darnell, Stephen P.	0	19,279
Das, Pranab K.	0	2,880
Davidson, Michael G.	0	3,572
Davis Jr., Gilbert P.	0	5,650
Davis, Kevin S.	0	18,171
Deal, Johnie E.	0	21,414
Debellis, Jeffrey R.	0	10,584
Dekker, Tom S.	0	2,868
Denson, Rebecca L.	0	19,537
Deperlinghi, Jerome	0	9,755
Dephouse, Derek H.	0	3,658
Deviney, Claudia H.	7,776	2,156
Diegel, Dennis M.	0	1,455

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Dimaggio, Susan M.	0	10,803
Dixon, David L.	0	56,700
Donahue, Keith	0	6,330
Doron, Scott J.	0	8,844
Dorr, Carol E.	0	5,000
Drake, Dallas F.	0	13,056
Dryden, Donald T.	0	2,733
Dryman, Terry D.	75,000	4,500
Dunham, Jeff	0	3,900
Dwan, Colin A.	342,890	20,573
Dyson, Matthew O.	48,773	5,820
Earley, Lawrence S.	0	1,856
Ebbing, Daniel J.	0	7,215
Ebright, Leonard T.	0	4,219
Edgerton, Gregory E.	0	5,493
Edmondson, Jamie C.	0	2,403
Evans, Bruce L.	0	1,651
Ezzell Jr., Borton E.	0	3,001
Fahrer, Victor S.	0	2,610
Falken, Daniel P.	0	5,744
Falls, Tyler P.	213,500	17,080
Feddersen, John R.	0	1,968
Feduccia, John A.	0	3,315
Feldblum, Paul J.	0	2,299
Ferguson, William B.	0	5,132
Ferrari, Justin	0	4,260
Ferris, Julian C.	0	9,186
Fisher, Floyd P.	0	635
Fisher, Mark R.	107,442	6,447
Flinn, Douglas J.	0	2,705
Fortunato, John E.	0	3,712
Frederick, Christopher T.	423,000	25,380
Froehlich, John J.	0	2,462
Fulk, Bobby L.	0	5,394
Fuller, Elizabeth S.	13,078	2,614
Furr IV, James E.	0	3,122
Futrell II, Chip G.	0	12,459
Gadol, Eric N.	82,932	4,976

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Games, Clyde D.	0	10,754
Gardiner, Barbara K.	0	1,602
Gasch Jr., Kenneth A.	127,800	23,004
Gatesidem, Phillip A.	0	9,077
Gaugert, Daniel M.	0	9,690
Gelbach, David	0	4,320
Gerardo, Charles J.	0	5,623
Gibbs, Leonard L.	2,600	903
Gibson, William B.	0	5,376
Glennon, Kerry P.	126,094	7,566
Goering, Charles D.	0	1,998
Goetz, Louis	0	29,101
Goff, Anthony B.	0	7,500
Graves, Christopher A.	0	9,236
Gray Jr., Paul A.	41,834	2,510
Green, Isaac H.	166,418	9,985
Green, Michael G.	0	4,494
Greyber, Daniel F.	145,583	8,735
Griffin, Jason M.	0	9,338
Griffin, Susan F.	0	22,295
Griffith, Michael G.	0	5,573
Grimes, Terrence L.	0	3,447
Groff, Diane G.	61,084	3,665
Guetler Jr., Joseph E.	0	1,871
Guill, Ann B.	64,022	3,841
Gurley, Robert S.	0	1,890
Hacker, Erik J.	0	7,754
Haddad, Nicholas H.	84,870	5,092
Haenni, Mary E.	0	9,804
Hallam, Deborah J.	0	2,304
Hanbury, Mary R.	0	3,101
Handford Jr., Richard C.	0	3,009
Hanley, Michael T.	0	716
Hanna, Michael S.	0	12,219
Hansen, Mark B.	0	21,827
Hansen, Robert C.	0	14,728
Hansen, Victor S.	87,445	5,247
Hardingpaul, Patricia A.	84,894	84,894

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Hardy, Larry M.	0	6,631
Harper Jr., Roger C.	0	16,506
Harper, Travis M.	0	5,003
Harris, Lori Ann A.	0	27,301
Harris, Michael W.	0	2,332
Harrison, Frank S.	66,617	3,997
Hart, Nancy E.	0	1,704
Harvin, George M.	40,196	2,412
Hasting Jr., Paul C.	0	16,200
Hasty Jr., Winfred N.	126,522	7,400
Hatcher, Jeffrey	0	1,929
Hatem, George M.	25,000	1,500
Hatem, Gregory P.	114,617	6,877
Hawfield, Wesley R.	120,000	7,200
Haynes, Harrison E.	158,000	9,480
Haynes, R. A.	0	6,448
Hemann, Randall W.	0	4,421
Henderson, James G.	0	18,737
Hendrix, Richard M.	0	11,000
Herget, J. Barlow	0	2,100
Heric, Matthew	0	5,933
Herrmann, Mark F.	40,000	2,400
Herwig, Christopher E.	95,000	5,700
Heu, William	0	2,984
Hevey, Craig S.	0	5,402
Hinsdale, Laurence C.	0	19,212
Hippen, Benjamin E.	0	11,509
Hitchcock, Daniel E.	0	2,833
Hobgood, Ann B.	12,000	4,000
Holder Jr., Fred A.	0	9,330
Hoover, John D.	0	32,520
Horsley, Eric F.	295,962	17,758
Hoty, Antony P.	0	19,396
Howard, James M.	0	9,844
Howell, Holly M.	0	5,394
Howell, James M.	0	13,980
Hoyt, Richard L.	53,000	3,180
Hubbard, Mark L.	0	3,584

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Huckabee, Charmaine M.	0	13,769
Hudgins, Verna E.	40,668	2,440
Huggins, Michael B.	0	17,241
Huneycutt, Jason C.	4,373	4,373
Hyman, Ethan D.	104,500	6,270
Iverson, Terry R.	0	15,600
Jackson, Lateef H.	0	16,500
Jacobi, Peter G.	0	3,032
Jacobs, Lane K.	164,243	14,154
Jacobs, Tonya E.	107,479	6,449
Jacobs, Windy L.	107,479	6,449
Jacobson, Jill D.	165,000	9,900
Jakes, Philip J.	0	39,854
James, Courtney R.	0	2,571
James, David A.	0	3,262
Jamison, Frederick C.	0	3,000
Jenkins, Joseph T.	39,400	2,364
Johnson, David D.	1,263,126	75,788
Johnson, Elizabeth N.	0	7,612
Jones, Eleanor T.	0	6,933
Jones, Robert A.	0	14,082
Kantlehner, Robert C.	0	5,091
Kaufman, Mark A.	63,000	3,780
Keefe, Eric D.	0	6,090
Keith, James A.	149,999	2,456
Kendall, Milton M.	0	4,260
Kerns Jr., Trent S.	1,710	103
Kerns, Elizabeth W.	1,710	103
Kerns, Trent S.	50,160	3,010
Kimbrough, Orman L.	0	3,241
King, Stephen C.	0	10,908
Kipp, Sandra D.	0	5,880
Kirk, Robin A.	0	3,000
Kittrell III, Robert G.	0	3,113
Kittrell Jr., Robert G.	3,420	205
Knott, William M.	0	8,940
Knox, John B.	174,592	10,476
Konz, Mary M.	42,000	2,520

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Kornegay Jr., Robert D.	98,000	5,880
Krider, Jon C.	63,900	10,450
Krissak, Thomas F.	2,077	415
Krueger, Derek	0	2,213
Kurtz, Maureen P.	0	7,207
Lambrecht, Paul R.	189,234	11,354
Lammers, Mark C.	0	4,200
Lane, Nancy M.	0	2,437
Larner, Angela M.	14,000	4,200
Lattimore, John B.	387,974	23,279
Lawrence, Martha M.	0	9,264
Lazore, Gerald J.	0	2,396
Leaver, Edward S.	0	7,500
Lenderman, Mark D.	196,143	11,769
Lentz, Tony F.	700,000	50,000
Leonard, Jerry W.	64,000	3,840
Lines, David H.	92,026	5,522
Long, Robin R.	0	5,982
Losacco, Carl D.	0	11,179
Louv, William C.	294,522	17,671
Lovelett, Roger W.	72,935	4,376
Lowe, Stephen B.	0	8,227
Ludeman, Clayton P.	0	116,790
Luther, Thomas A.	22,186	666
Lyle, Mary L.	0	3,688
Lynn, Freddie L.	300	200
MacLeod, David B.	0	3,067
MacPhee, Keelee J.	0	24,614
Madison, M. B.	0	3,736
Malhoit, Gregory C.	48,680	2,407
Manly, Julie E.	0	4,230
Mantler, Gordon K.	0	5,060
Martin, David	0	5,130
Martin, John R.	39,192	761
Martin, Victor C.	120,000	789
Massenburg, Barbara S.	26,000	7,800
Massey III, William G.	360,918	87,559
Matory, James L.	0	24,330

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Matthews, Gregory R.	12,712	5,500
Matthews, Hazel B.	0	2,181
Mayfield, Anne M.	0	10,830
McCall, Paul J.	0	3,090
McCallister, Steven K.	0	15,000
McCarragher, Donna R.	84,894	84,894
McCaully, Thomas M.	0	4,652
McClendon, Kara L.	0	2,628
McCraw, William S.	56,992	3,420
McDowell, James C.	0	12,000
McGregor, Sultan K.	2,000	1
McKay, Harry S.	27,779	9,260
McKenzie, James A.	0	4,726
McKillop, Robert H.	0	10,447
McLean, Hope J.	1,900	48
McLester, Ralph J.	89,812	5,389
McMahon, Thomas J.	0	4,121
McMillan, William O.	0	4,343
McMullin, Adam P.	0	11,890
McVey, Douglas S.	0	5,171
Meck, Warren H.	0	12,145
Meeker, Charles	0	2,924
Meier, Erich M.	225,000	13,500
Mercer, Mark S.	0	2,500
Mercer, Michael W.	1,400	2,400
Michael, Autumn R.	150,000	9,000
Michel, Kirk W.	94,299	5,658
Miller, Chad M.	0	23,219
Mitchell, Olds S.	78,869	4,732
Mitchell, Thomas O.	0	4,455
Moffie, Robert P.	0	2,751
Mongold Jr., George	23,128	4,625
Montgomery, David J.	0	4,831
Moon, Christina R.	0	1,620
Moore Jr., Amos L.	398,750	23,925
Moore, Matthew A.	0	10,869
Morey, Rajendra A.	0	2,457
Morgan, Kevin J.	38,760	4,500

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Moser, Martin B.	214,038	12,842
Mosier, Erin K.	239,637	14,378
Mulrooney-Jon, Dylan C.	0	2,483
Munro, Julie B.	0	10,293
Murray Jr., Richard D.	3,665	220
Musser, Clayton R.	0	18,106
Mylet, Thomas J.	68,000	4,080
Nash Jr., Brent D.	102,635	6,158
Neal, Cynthia A.	0	13,500
Nelligan, Myles	26,400	1,584
New, Rebecca	0	7,092
Nicholson, Nancy E.	0	6,426
Nightingale, David W.	0	13,976
Nixon, Dale W.	0	7,330
Nolton, Susan G.	0	2,985
Norvell, Douglas K.	0	63,465
Norwood, George A.	48,773	1,848
Nutter, David G.	0	3,896
O'Connell, Jacqueline	0	2,712
O'Day, Gail R.	0	7,508
O'Grady, Kevin J.	154,272	3,433
Osterkatz, Sol C.	0	5,378
Overby, William D.	0	9,366
Owen, Elizabeth	0	17,001
Owen, Kim F.	2,267	2,267
Owen, Timothy W.	63,390	3,803
Owens III, Ambrose L.	0	6,960
Pacofsky, Gregory J.	0	9,300
Paine, Jeffrey L.	0	19,845
Parker, David R.	237,113	14,227
Parsons, Alton E.	0	5,705
Patel, Ajay	30,222	6,716
Pattishall, Roy G.	0	5,196
Pauwels, Jean	48,524	2,911
Pawlik, Joseph R.	0	2,316
Payne, Mark T.	12,000	1,200
Peace Battle, Inc.	0	35
Pelton, Lee H.	0	7,221

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Perkinson, Jeffrey C.	0	1,750
Perry Jr., Robert E.	0	2,396
Peters, Marni A.	0	4,200
Peterson, Charles T.	0	8,610
Phillips, Marc B.	56,750	3,405
Phinney, David A.	24,000	9,000
Pickens, Edward M.	0	9,947
Pitt, William M.	0	2,040
Pittman, Beryl C.	0	38,312
Pollitt, Susan H.	0	2,573
Poole, Patsy J.	126,880	7,613
Porter, Kristie	0	2,776
Potter, Robert S.	83,368	18,482
Pownell Jr., Henry C.	0	79,014
Poythress, David S.	0	24,421
Prater, Katherine C.	0	2,400
Pritchett, Laura G.	60,000	1,620
Queen, Jason T.	0	5,827
Reddick, Bradley H.	0	13,500
Reid, William D.	65,459	3,900
Reilly, Thomas P.	0	1,884
Rezeli, Jeffrey C.	40,639	5,916
Richey, William M.	0	377
Riemann, Neil A.	0	10,800
Roberson, Emily	0	19,265
Robertson, Ann	687,303	41,238
Robinson III, Wilbur H.	65,150	3,909
Roethlisberger, Albert W.	0	9,180
Rogers III, Arthur H.	0	26,554
Roland, Russell D.	0	10,149
Rose, Kenneth J.	1,743	1,743
Rosen, Andrew T.	0	4,500
Rosenke, Scott W.	0	9,399
Rucker, Jonathan N.	0	7,745
Russell, Laura K.	0	1,500
Saba, Roy J.	126,880	7,613
Sayers, Donald D.	0	6,234
Schell, Marshall P.	0	2,812

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Schmidt, David J.	115,000	7,666
Schmidt, Paul M.	0	14,372
Schout Jr., James W.	284,531	2,302
Schramel, Michael R.	0	5,760
Scott, George R.	0	4,992
Scott, Joe	0	1
Scott, Joseph N.	0	7,841
Seales, David M.	0	29,073
Sease, Anthony M.	0	14,668
Sedaca, Andrew J.	0	2,382
Seman, Joseph J.	26,561	5,312
Sensabaugh, Marvin A.	0	14,472
Serkin, Allen B.	0	5,593
Shafer, Benjamin S.	0	2,291
Shaw III, Ralph H,	0	4,910
Sheffield Jr., Frank H.	0	5,162
Sheridan, Richard M.	0	5,499
Shoenfelt, John C.	0	1,913
Shore, Michael J.	0	7,473
Silvester, Benjamin J.	52,000	3,120
Siu, Eduardo	0	2,795
Slavich, Francis E.	0	29,700
Sliva, Joseph A.	0	7,680
Smiley, Alexander	8,400	1,680
Smith Jr., Edward C.	0	1,334
Smith, Austin W.	62,940	3,776
Smith, Christopher B.	660,437	132,087
Smith, David B.	251,500	15,090
Smith, Robert D.	0	4,386
Smith, Stephen T.	0	4,360
Smyth, Joan A.	0	1,924
Solomon, Mark J.	128,000	7,680
Sopper, John R.	87,815	5,269
Sowers, Kevin W.	335,425	20,126
Sowers, Michael W.	0	4,694
Speed, Katana S.	300	400
Sperber, Marc A.	152,500	45,750
Spinello, Kim M.	292,419	17,545

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Spitz, Adam	70,000	4,200
Spring, Natalie R.	0	5,910
Sreenivasan, Gopal	0	26,026
Stark, Marcel I.	240,848	72,254
Staton, Matthew D.	73,416	4,405
Steel, Benjamin M.	36,400	2,184
Steel, Robert B.	68,190	20,457
Stein, Gerda	0	51,164
Stewart, Andrew M.	105,811	6,349
Stiles, Curt H.	0	26,600
Stohler, Hugh D.	0	5,970
Stoneburner, John H.	0	1,429
Stonecypher, Steven J.	0	1,935
Storaasli, Marie E.	6,000	6,000
Stout, Michael C.	0	1,455
Stout, Todd C.	238,398	14,304
Straley, Dianne	0	6,725
Sturges, Conrad B.	456,274	27,376
Sugg, Andrew M.	34,760	804
Sugg, John B.	0	2,963
Sui, Wen	800	600
Swinney Jr., John G.	0	3,964
Szymonski, Joy A.	0	8,660
Talbot, David	0	12,614
Tammaro, John A.	0	12,192
Tarlton, Sean T.	0	635
Taylor, Robert	0	44,833
Taylor, Sabra B.	0	4,074
Ten Brink, Craig E.	0	12,177
Thomas, Kelly S.	0	3,599
Thomas, Robert S.	0	5,211
Thompson, Deborah A.	0	8,500
Thompson, Jonathan C.	47,092	2,825
Tilley, Christopher M.	0	36,366
Tillman III, Rollie	0	9,672
Todd, James C.	0	9,930
Toledo, Alexander H.	0	7,920
Tompkins, Peter O.	0	9,480

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Travis, Evan H.	27,000	1,620
Trichon, Benjamin H.	118,966	7,138
Troutman, William S.	0	9,900
Tuch, Shannon M.	0	3,690
Tyson, Joseph B.	1,134,410	23,998
Vap, James G.	449,016	26,941
Vaughan, Charles J.	49,015	2,941
Vaughan, James E.	123,752	7,425
Vogler, Robert C.	0	15,857
Volpe, Rocco	0	5,148
Vreeland, Michael J.	0	2,706
Wallace, Leesa L.	218,113	13,087
Walton, Charlotte N.	0	4,668
Ward, Roger D.	0	3,429
Warden, Dennis P.	0	3,477
Watkins, William R.	49,562	6,344
Wear III, Thomas R.	275,206	16,512
Weaver, Gary C.	76,443	4,587
Wenger, Keith A.	0	2,003
Wheless, James H.	250,000	15,000
Whitehurst, James M.	0	20,671
Whittier, William A.	0	7,680
Wiles, David R.	0	17,994
Wilkinson, Erich J.	0	2,020
Williams, Crystal A.	550	300
Williams, Quinn I.	10,000	4,210
Wilmoth, Thomas M.	46,235	9,247
Wilson, John C.	0	11,923
Wilson, Timothy S.	36,394	2,184
Winchester, Mary K.	0	4,063
Winesette, David C.	0	635
Winner, Leslie J.	385,850	23,151
Wolff, Michael	0	5,033
Wolfrum, Leila N.	72,000	14,400
Wood, John C.	69,284	20,785
Wood, Nell	0	1,740
Woods, Christopher W.	259,530	15,572
Woomer Deters, Katharine B.	7,801	1,560

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Wooten, Patrick S.	34,760	804
Workman, Michael G.	0	8,999
Worthy, Acey	0	10,200
Yarboro, Douglas D.	0	9,377
Yeager, Ralph	0	34,305
Zaloom, John A.	0	7,976
Zubrow, Alexis A.	0	2,474
Total Credits Taken for Non-Income- Producing Property	24,770,655	5,558,453

Source: Revenue Research Division, North Carolina Department of Revenue

Procedural Notes: Information from taxpayer returns, including taxpayer errors and omissions, is shown as reported. All returns are subject to audit.

Due to informational limitations, the amounts of ‘credits taken’ in this report are the installment amount reported by the taxpayer on Form D-400TC.

‘0’ in the Expenditure column indicates that the expenditure was reported in a prior year.

Expenditures were adjusted to ‘0’ if the taxpayer reported a positive expenditure amount, but the same expenditures were reported in the prior year.