

North Carolina Department of Revenue

Historic Rehabilitation Credits

Article 3D

Returns Processed during Calendar Year 2016

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Income-Producing Property (257 Taxpayers)		
Abrams, Douglas B.	0	15,383
Albright, Michael E.	0	16,000
Alford, Annie E.	0	150
Alford, Helen	0	550
Alston, Douglas C.	0	845
Alston, James C.	0	25
Altizer, James W.	229,404	9,176
Arguello, Kenny	0	550
Arneson, Sarah M.	448,600	17,944
Arnold, Angela D.	106,358	4,254
Ashburner, Daniel J.	1,259	2,500
Atlas, Todd	0	19,210
Avila Ramirez, Fernando V.	0	785
Baldwin, Kevin L.	335	489
Bank of America Corporation	0	15,021,802
Barber, Cherie N.	3,500	3,500
Barger, Mark A.	232,579	9,303
Barrera Salga, Isabel	0	833
Barrett, Debbie B.	1,268	112
Basham Jr., David	4,200	2,000
Bass, Jerry H.	10,000	1,000
Beach, Jeffrey L.	0	7,511
Bengel, Steven L.	0	6,413
Benitez Corona, Claudio	1,245	1,250
Bennett, Bradley R.	0	2,683
Blackshaw, Peter	14,982	2,996
Blalock, Dolan F.	81,690	16,338
Bloom, Pamela E.	0	4,596
Bohl, Robert D.	24,599	4,912
Bonilla, Fausto	2,150	946

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Booker, Ericson W.	0	40,449
Bowman, Robert B.	277,527	11,101
Branch Banking & Trust		336,243
Briggs, Daniel	0	385
Briggs, Jack D.	0	5,808
Brodey, Benjamin B.	0	17,984
Brooks III, Fred G.	0	10,989
Browder, Matthew D.	0	31,200
Brown, David N.	0	6,839
Bryan, Harrel D.	0	3,490
Bullard Jr., Maidson E.	111,753	4,470
Campbell Jr., Robert B.	0	2,881
Cariaga, Rolando	8,000	500
Carrigan, Douglas W.	493,876	19,755
Cartner, Lisa C.	24,370	975
Cartwright, Stephanie C.	568,881	48,955
Cauley III, James P.	265,371	10,615
Chadowitz, Jack	74,363	19,832
Chambers, Cora M.	2,000	37,673
Chaney, Dawn S.	363,182	14,527
Chavonne, Anthony G.	288,851	11,554
Cheek, Clayton W.	106,877	4,275
Clark, Wendy K.	0	17,897
Cline, James T.	1,093,559	43,742
Contreras, Jose A.	0	347
Copeland, Colin	358,629	14,349
Cox, Jeremy	2,500	2,500
Creighton, Charles A.	0	21,590
Crossman, Colin R.	0	12,293
Crow, Kenneth F.	78,718	3,149
Cummins, Barry K.	0	2,681
Cummins, Bradley K.	0	6,544
De Jesus-Balderos, Marcos	3,000	2,000
Deitch, Marc W.	0	546
Depew, Henry C.	43,920	1,757
Diaz, Lenoel	0	877
Dierkes, Nicholas J.	0	4,562
Dills, Troy L.	0	5,000

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Dittmer, Joshua E.	0	12,600
Dodson, Joni D.	2,300	1,850
Dollard, Lashawnda E.	500	500
Dryden, Donald T.	0	17,400
Dunn, Christopher J.	195,687	7,827
Edgerton, Rilly	391,698	15,668
Edwards, Donald J.	814,134	32,565
Ellett, Frank R.	1,154,235	46,169
Ellis, Beverly	150	150
Ellis, Shaquasia N.	0	131
Esposito, Mark J.	500	500
Fahad, Alexander C.	400	472
Felton Jr., Carl L.	4,000	3,500
First Citizens Bancshares, Inc.	0	2,648
Fisher, Mark R.	0	6,447
Fowle Jr., David T.	0	3,291
Fowler, Christian A.	21,456	5,364
Fox, Brett A.	0	5,953
Friedlein, David H.	0	2,686
Friesen, Jonathan E.	106,877	4,275
Frye, Pamela D.	286,833	11,473
Garcia, Henry	0	6,512
Garcia, Julio	100	100
Gasch Jr., Kenneth A.	131,246	5,250
Gateway Management Services, LLC	0	34,200
Gillespie, David M.	5,386,430	215,457
Gladdeck, Jessica K.	0	4,358
Glennon, Kerry P.	0	1,444
Goodnight, James A.	0	61,237
Grant, Regina E.	100	100
Greene, Kelly L.	0	12,825
Greene, Michael W.	203,975	8,159
Greyber, Daniel F.	0	5,823
Grospiron, Alex	81,083	3,243
Gurley, Robert S.	0	11,500
Hakan, Michael J.	300,275	12,011
Hanner, William E.	0	1,225
Harley II, Johnny F.	0	125

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Harmon, Jerald S.	0	10,639
Hatem, George M.	0	2,007
Hatem, Gregory P.	0	9,201
Healy, Shannon M.	0	3,536
Hedrick Realty and Investment Co.	0	6,792
Henderson, Charles C.	78,718	3,149
Hester, J. Thomas	0	29,622
Hill, Stephen	3,117,288	124,692
Hinton, Brandy L.	1,500	1,500
Hoffman, Jack	394	394
Hollingsworth, Daniel B.	0	11,000
Howell, Holly M.	0	3,200
Hugh, Delmonte	12,500	12,500
Inman, Quintino	0	800
J. T. Hobby & Son, Inc.	870,008	123,957
Jacobo Chahuiz, Daniel	2,000	585
Jacobs, Randy L.	345	102
James, Brent P.	500	500
Jasper, Stacy L.	0	42,863
Jenkins, Charles B.	0	550
Johnson, William C.	0	6,940
Joyner, Patrick	2,156,505	86,260
Juarez, Nancy E.	500	500
Kane, Richard L.	91,440	3,658
Keul, Norman C.	90,220	2,130
Kombou Sile, Franck R.	1,000	1,000
Krieger, Richard	0	39,138
Laine, Peter H.	1,688,420	67,537
Lambeth, John E.	26,546	4,000
Leland, William J.	67,900	5,467
Lemus, Faustino	0	250
Lemus, Natividad	0	587
Levenberg, Stephen B.	0	7,134
Lindley, Kevin G.	0	1,519
Lindsay, Christina M.	1,510	985
Lingle, Izetta H.	0	693
Lipsky, Charles E.	81,685	16,337
Lipsky, Joshua N.	81,685	16,337

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Little, Walter R.	0	12,352
Love, Vanessa P.	5,000	350
Lowery, Kenya J.	23,000	12,000
Lozano Hernan, Edwin	872	136
Lumpkin, Edwin B.	159,861	6,394
Mack, Brian	5,000	4,000
Macy's Retail Holdings, Inc.	0	212,853
Makgill, Diane C.	0	2,142
Mangum Debra D.	0	2,550
Marchardino, Gianni	115,500	4,620
Maxwell, Samantha A.	30	30
McCulloch, Joseph E.	0	99,417
McDonald Jr., John C.	459,049	18,362
McFadyen Jr., William D.	0	12,825
McGirt, Dijon P.	1,500	500
McNulty, Tobias	358,735	14,349
Mercer, Michael W.	2,400	2,400
Metcalf, Michael D.	0	1,370
Mikulaninec, Claudia E.	30,581	6,116
Milstein, Ronald S.	190,000	7,600
Morales, Hector M.	0	635
Moscardini, Edward C.	115,500	4,620
Moscardini, Gian	115,500	4,620
Mullen, Deborah	4,500	3,300
Napp, David A.	18,159	3,632
Nettles, Clyde E.	0	535
News and Observer Publishing Co.	2,162,475	172,998
Nixon, Dale W.	219,823	8,793
Norman, Gerald R.	100	100
North, Brenda J.	1,000	100
Norwood, Carla M.	0	18,260
Oliver, George M.	106,877	4,275
Orr, Kendra M.	3,500	1,000
Osorto-Espino, Emilia	0	525
Owens, Annie J.	0	150
Owens, Jerry	0	4,916
Pahl, Thomas H.	0	4,473
Palacios, Gloria A.	0	625

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Parker, Eboney C.	25	123
Parrott, Robert D.	116,289	4,652
Patterson, Bertha J.	0	335
Perry, Celestine M.	1,500	200
Petrini Poli, Charles E.	173,753	6,950
Pettit, William W.	0	33,279
Pocasangre, Sandra I.	832	455
Quinones, Aaron K.	200	200
Ransdell III, William G.	0	5,520
Rawlins, Donald R.	101,023	6,061
Reardon, Thomas R.	0	1,157
Rees, Floyd E.	0	12,359
Reilly, John P.	81,685	16,337
Rempel, Kassandra L.	13,418	537
Ritchie, Baxter M.	0	38,840
Rivers, Bobby C.	300	100
Rivers, Roslyn H.	800	200
Robertson, Ann	0	27,492
Rogers III, Arthur H.	0	34,401
Romanosky, Anthony J.	0	438
Rowan Investment Company, Inc.	0	296
Russ Ellett Childrens Trust U/A	0	46,169
Ryding, Jeffrey L.	0	718
Samia, Mark A.	6,830	2,070
Santiago, Martha I.	5,000	4,000
Santos, Hector R.	0	1,525
Scarborough, David C.	0	14,976
Schmidlin III, Walter A.	408,500	16,340
Shore, Michael J.	0	7,473
Sims, Dawn C.	300	150
Smith, Narradeau	500	1,500
Soto, Lisa G.	966	1,236
Spencer, Brandon D.	200	200
Starkey, Brian H.	12,595	2,519
Steinman, Charles T.	0	15,655
Steinman, Timothy C.	136,981	27,396
Steinman, Todd A.	0	27,396
Stoudemire, Nekita D.	400	400

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Suer, Lucas J.	0	868
Sullivan, Michael J.	0	3,800
Swartzel, Richard A.	3,010,531	120,421
Sylvester, Leon W.	0	55,101
Tarver, Faith E.	750	750
Taschuk, Myron J.	76,548	3,062
Tate, Larry I.	3,398	136
Taylor III, Fletcher B.	0	2,200
Taylor, Fletcher	0	1,524
Taylor, Merritt	54,992	2,199
The Sherwin-Williams Co.	0	803,046
Thomas, Gerald	0	485
Thorsen, Pete L.	10,000	450
Thurston, Harrison H.	0	2,079
Tonsmeire, William	220,000	8,800
Valentine, Darrn	6,000	10,000
Vanderhoof, Cynthia L.	1,200	100
Walker III, Samuel A.	465,712	18,628
Walker IV, Samuel A.	0	18,628
Watts, James G.	700	700
Wetzel, Michael S.	568,299	22,732
Whitaker, Robert F.	832	1,286
Williams, Joseph B.	0	22,639
Williams, Norman C.	0	18,088
Williams, Wesley	6,000	3,000
Wilson, Aprel M.	200	200
Womack, David H.	0	4,652
Woodell, Ashlyn D.	175	175
Woodell, Christopher M.	400	400
Wooten, John M.	116,289	4,652
Wooten, Ursula T.	1,000	200
Wrinn, Stephen J.	270,716	10,829
Wyatt, James C.	0	200
Xilinx, Inc.	52,950	7,061
Young, Emma	0	7,450
Young, Michael W.	1,100	143
Zapata Zuniga, Mara	0	546
Total Credits Taken	32,809,040	19,338,297

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Non-Income-Producing Property (661 Taxpayers)		
Adams, Geoffrey W.	0	5,277
Adams, Gregory B.	3,552	3,552
Adolphsen, Jeffrey D.	0	6,581
Alchediak, James	0	2,117
Alford, Darius E.	0	150
Allis Jr., Guy E.	119,977	7,199
Alphin, William J.	0	6,484
Anderson, William E.	0	4,590
Araujo, Roshelle	0	3,973
Armento, Anthony F.	0	11,239
Armfield, Shannon M.	36,000	2,160
Arnold, Martha S.	32,713	1,963
Arundale, Matthew F.	180,000	18,000
Ashburner, Daniel J.	3,600	3,600
Aspnes, David E.	0	7,800
Autry, Larry K.	0	1,680
Babson, John C.	0	6,120
Bagley, Marjorie H.	67,000	4,020
Baldridge, Jacob D.	66,200	3,972
Ballantine, William C.	268,900	16,134
Banks, William D.	272,724	16,363
Barabash, Igor M.	19,500	3,900
Barber, Cherie N.	1,000	1,000
Bardolph Jr., Richard	59,736	3,584
Barger, Nora S.	0	10,571
Barker, James M.	196,655	11,799
Barnes, Gregory B.	0	9,685
Barone, Stephen J.	11,745	2,349
Barrett, Debbie B.	0	600
Barron, Walter J.	0	5,100
Basham Jr., David	1,900	600
Bastian, Donald M.	0	3,201
Beach, Ivan T.	0	3,300
Beck Jr., James L.	0	2,500

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Beck, Christine N.	0	2,500
Becker, Daniel L.	0	6,899
Beckett, Daniel H.	0	3,480
Beddingfield Jr., Markel C.	87,500	5,250
Bennett, Becky J.	0	1,911
Bergstone, Mary G.	0	2,984
Bernstein, Joshua E.	0	13,410
Bible, Stewart A.	0	8,634
Bickford Jr., David M.	0	5,241
Billeaud, Jody G.	112,631	6,757
Bishop, John A.	0	74,502
Bland, Charles E.	0	5,180
Boarati, Mary S.	62,200	3,732
Bode, Brian D.	184,350	22,122
Boeker, Thomas W.	0	14,250
Boelhower, Mary E.	0	5,401
Boggs, Eric T.	110,750	6,645
Boner, Justin R.	219,703	6,591
Booker, Matthew	0	2,198
Bortiri, Esteban	0	3,305
Boswell, John G.	78,949	15,790
Boyce, Michael A.	102,443	6,147
Boyette, Marion D.	194,309	43,572
Bozik, Daniel S.	0	15,600
Bradford, Scott	46,000	2,760
Brandon, Tonya L.	83,500	5,010
Brawley Jr., Daniel L.	0	3,480
Broadfoot, John W.	0	7,679
Broccolo, Nicholas	0	8,100
Brockmann, Todd C.	0	24,281
Brouwer, Kevin S.	42,500	2,550
Brown Jr., Frank R.	0	7,500
Brown, Joy J.	237,403	14,244
Brown, Neil N.	0	26,477
Brown, Thomas E.	117,000	7,020
Bruin, Martinus N.	55,768	3,346
Brunette, Bryan	451,494	16,318
Bryan, Colin D.	0	3,965

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Bryce, Scott T.	85,610	5,137
Bullard Jr., Maidson E.	40,692	2,442
Burckley, William J.	0	3,428
Bussey, Doyle M.	118,171	7,090
Cagle, William, J.	0	4,316
Calvert, John J.	232,348	27,441
Campanella, Thomas J.	0	785
Campbell, Julie L.	700	100
Canupp, William R.	4,829	4,829
Caplinger, Mary Anne G.	0	11,045
Capps, Jordan S.	0	5,610
Cariaga, Rolando	8,000	500
Carpenter, John M.	154,000	9,240
Carr, Jonathan P.	64,704	3,882
Carreker, Justin M.	0	3,644
Carter, Adrian M.	135,000	14,910
Carter, Jenna C.	6,486	1,297
Carver, Eugene V.	66,622	3,997
Chambers, Frank R.	0	2,861
Chambers, Joyce D.	3,246	456
Chaney, Dawn S.	56,468	3,388
Chappel, James G.	36,835	2,210
Chung, Richard J.	0	7,752
Chupkowski, Linda C.	223,046	13,383
Churchill, R.E.	40,000	4,800
Cirillo, Melissa L.	57,704	3,462
Clabaugh Jr., David M.	57,000	3,420
Clark, Cheryl A.	0	1,136
Clark, Daryl J.	5,000	796
Clevenger, John G.	0	6,072
Clower, Dan F.	120,374	22,638
Coats, Eve C.	18,757	3,751
Cohn, Michael C.	600	600
Cole Jr., William P.	0	6,988
Cole, Glenn	0	14,504
Cole, Stephen N.	226,098	13,566
Coleman, Christopher M.	0	3,595
Collie, Jeffrey B.	0	5,880

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Coltrane Jr., Joseph M.	168,490	10,109
Colvin Larry G.	44,521	2,671
Cooke III, James D.	0	4,144
Copeland, Daniel W.	0	2,997
Cordell, Jill C.	0	10,899
Cormier, Trenton J.	3,226	8,200
Cottrell, James B.	0	8,948
Covington, Christopher G.	0	6,372
Cox, Jeremy	3,500	3,500
Craft, Daniel C.	88,286	5,297
Craig, Matthew W.	99,922	5,995
Crain, Jason R.	0	2,953
Crandall, Russell C.	0	5,500
Creamer, Marvin C.	0	10,344
Cribbins, Paul S.	146,300	8,778
Crockett, David F.	25,264	1,516
Crowder, Sidney L.	184	184
Crum, Mark D.	0	3,067
Cummings, James J.	0	6,692
Cunningham, J C	129,536	7,772
Curl, Ira W.	0	1,929
Cusick, Steven M.	425,000	25,500
Dail Jr., Macon M.	408,733	24,524
Dalton, Stephen T.	19,123	3,825
Daly, Virginia T.	50,000	5,000
Daniels, John L.	8,350	1,664
Das II, Pranab K.	34,926	2,096
Davidson, Michael G.	0	3,126
Davis Jr., Gilbert P.	76,000	5,265
Davis, Benjamin T.	186,236	11,174
Davis, Chris G.	30,929	1,856
Davis, Kevin S.	0	15,237
Deal, Johnie E.	0	21,414
Debellis, Jeffrey R.	0	10,584
Deese, Jeremy M.	0	4,500
Deihl, Joshua J.	157,707	9,462
Dekker, Tom S.	232,203	13,932
Delborne, Jason A.	133,079	7,985

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Deperlinghi, Jerome	0	9,000
Dephouse, Derek H.	0	4,121
Detar, David S.	0	19,046
Deviney, Claudia H.	0	1,657
Dewire, Thomas M.	191,838	11,510
Di Maio, Maria S.	203,643	12,219
Dietsche, WC	0	30,139
Difelice, Ronald	45,665	2,740
Dimaggio, Susan M.	0	18,005
Dixon Jr., Roy G.	567,696	34,062
Dixon, David L.	189,000	56,700
Dobbins, James W.	117,889	5,932
Dollard, Lashawnda E.	500	500
Donahue, Keith	31,650	6,330
Dorr, Alexandra	0	2,346
Dowling Jr., Roderick A.	65,095	3,906
Drake, Dallas F.	0	13,056
Drum, Ethan L.	113,029	6,782
Dryden, Donald T.	340,550	20,433
Dryman, Terry D.	0	4,500
Dunham, Jeff	0	3,900
Dwan, Colin A.	0	20,573
Earley, Lawrence S.	0	1,856
Ebbing, Daniel J.	0	7,215
Eberle, Robert A.	52,440	3,146
Ebright, Leonard T.	0	6,505
Edgerton, Gregory E.	0	7,098
Edmondson, Jamie C.	0	2,403
Efird, Brian H.	0	23,266
Egger, Louis D.	0	4,440
Elliot Jr., Milton	0	1,000
Elliot, Robert M.	0	4,080
Ellis Jr., Thomas D.	206,548	12,393
Ellis, Beverly	175	175
Emerson, Jared S.	75,101	12,516
Esposito, Mark J.	500	500
Evans, J M	349,046	20,943
Evans, James G.	0	13,530

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Ewen, Todd J.	250,959	15,058
Ezzell Jr., Borton E.	39,195	2,352
Fahad, Alexander C.	20	221
Fain, Daniel I.	0	5,472
Fain, David R.	346,624	20,797
Fallis, Dennis B.	0	7,800
Falls, Tyler P.	0	12,810
Farless, Lonnie Wood	65,000	3,900
Faulkner II, Woodson E.	63,169	7,580
Feduccia, John A.	0	3,315
Feldblum, Paul J.	82,000	4,920
Felton Jr., Carl L.	4,000	3,000
Fingerhut, Joel D.	0	2,700
Floyd, Charles F.	0	6,670
Flynn, Brian	199,000	11,940
Flynn, Matthew K.	0	5,460
Foltz, Joshua N.	125,000	7,500
Fox, Andrew C.	0	2,100
Frazier, Sharon W.	0	2,129
Frederick, Christopher T.	0	25,020
Freiberger, John J.	290,800	17,448
Freimanis, Andris H.	187	187
Froehlich, John J.	182,150	17,271
Furr IV, James E.	9,680	3,703
Futrell II, Chip G.	0	12,459
Garafola, Lesley E.	88,350	5,301
Garcia, Julio	100	100
Garcia-Pulido, Esther	0	375
Gardner, Jared E.	0	4,006
Gasch Jr., Kenneth A.	0	7,668
Gatesidem, Phillip A.	0	9,077
Gaugert, Daniel M.	0	9,690
Gayer, Charles K.	0	62,902
Gaylor IV, Charles P.	199,500	11,970
Gershenthorn, Jerry B.	72,070	4,324
Gibbard, Raffaella R.	3,000	600
Gilliam, Marita H.	32,000	1,920
Gitter, Kent W.	290,000	17,400

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Glazer, Patti L.	0	3,152
Glickfeld, Lindsey L.	214,935	12,896
Gligorovic, Predrag V.	257,000	30,840
Goldman, Glenn J.	25,000	1,500
Gooch, James P.	0	2,772
Goode, Lindsey B.	61,559	3,694
Goodwin, Mary W.	32,266	1,936
Gordon, Charles D.	399,340	23,960
Gotwalt, Jessica W.	148,792	44,637
Graddy, Logan G.	231,565	46,313
Graves, Amanda	0	13,872
Graves, Christopher A.	0	9,236
Green, Isaac H.	0	9,985
Greene, Kimberly A.	5,400	3,240
Greyber, Daniel F.	0	8,735
Griffin, Susan F.	199,351	41,457
Grillo, Samantha	199,900	11,994
Gromlovits, Richard A.	0	5,160
Gros, Francois	223,500	13,410
Gruener, James W.	97,720	5,863
Guetler Jr., Joseph E.	0	1,853
Hacker, Erik J.	38,768	7,754
Haddad, Nicholas H.	0	5,092
Haenni, Mary E.	222,731	10,726
Hall, Randall C.	14,970	2,994
Hallowell, Anne J.	128,352	7,701
Hamilton, Jerry W.	250	50
Hammond Green, Margaret E.	29,925	1,796
Hanbury, Mary R.	46,802	2,808
Hanna, Jonathan M.	131,156	7,869
Hansen, Mark B.	0	21,827
Hansen, Robert C.	0	14,728
Hardingpaul, Patricia A.	0	5,094
Harper Jr., Roger C.	82,532	16,506
Harper, Travis M.	0	5,003
Harrell, Catherine N.	147,886	29,577
Harris, Angela D.	0	500
Harris, Patricia A.	0	700

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Harrison, Frank S.	0	3,997
Hastings, Cindi	270,000	16,200
Hasty Jr., Winfred N.	0	7,591
Hatch, George L.	30,000	1,800
Hatem, George M.	0	1,500
Hatem, Gregory P.	372,514	29,228
Hatton, Joshua K.	0	2,700
Hawfield, Wesley R.	0	7,380
Haws, John C.	0	4,800
Haynes, Harrison E.	0	9,480
Hazelrigg, Maak D.	0	11,135
Healy, Shannon M.	0	3,030
Heeks, Robyn W.	184,182	11,051
Hefetz, Yosef	86,390	17,278
Herold, Kathy J.	12,000	2,500
Herst, Lawrence A.	0	5,567
Herwig, Christopher E.	0	5,700
Hill III, Andrew J.	0	1,620
Hinton, Brandy L.	1,200	1,200
Hobbs, Cleo W.	500	500
Hodge, Michael C.	0	2,699
Holder Jr., Fred A.	0	10,768
Holderness, Howard	0	13,500
Hollis, Quantae L.	3,000	2,500
Honeycutt, Stuart M.	0	10,200
Hoose, Katherine C.	0	2,400
Hoover, John D.	0	32,520
Horsley, Eric F.	0	15,181
Horton III, Brewer T.	33,888	6,778
Houde, Joseph F.	142,000	8,520
Howard, James M.	0	9,844
Howell, Holly M.	0	2,400
Hoyt, Richard L.	0	3,180
Hudgins, Verna E.	0	2,440
Huffstetler, Palmer E.	0	4,155
Hullihan, James R.	84,421	5,065
Hyman, Ethan D.	0	6,270
Ireland, Frederick	0	2,640

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Iverson, Terry R.	0	15,600
Jacobs, Randy L.	621	305
Jacobson, Jill D.	49,500	9,900
Jacobson, John R.	0	4,289
Jakes, Philip J.	0	4,138
James Jr., Roger A.	0	32,587
James, Daniel P.	0	2,160
Johnson, David D.	0	75,788
Johnson, Elizabeth N.	0	6,735
Johnson, Jon C.	145,000	8,700
Johnson, Samuel B.	47,850	2,871
Jones, Raymond C.	250,000	15,000
Jones, Steven S.	0	4,810
Jordan, Jacqueline S.	65,643	3,938
Joyner, Cheryl D.	103,675	6,220
Kasefang, Curtis A.	0	3,817
Kaufman, Mark A.	0	3,780
Keith, James A.	0	2,888
Kelley, Rasheda	0	1,944
Kelly, Debra A.	119,000	3,534
Kelly, Elinor H.	41,159	2,470
Kendall, Robert E.	89,948	7,196
Kenyon, Garreth J.	0	1,500
Keryluk, Tyler	34,619	6,924
King, Troy D.	0	8,437
Kingsley, Sean	0	2,939
Kirk, Robin A.	0	2,021
Kirsh, Carolin S.	13,650	2,730
Kite, Jamie G.	38,000	2,280
Kittrell III, Robert G.	51,883	3,113
Kittrell, Bennett	1,716	103
Kittrell, Robert	1,716	103
Kneile, Uwe	373,116	22,387
Knott, William M.	0	8,940
Knox, Madison R.	84,242	5,055
Kober, Tyler C.	0	4,936
Kombou Sile, Franck R.	1,000	1,000
Konz, Mary M.	0	2,520

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Kortenaar, Paul	0	3,900
Krissak, Thomas F.	2,077	415
Kurtz, Maureen P.	0	7,207
Kwak, John	1,585	1,000
Lackery, Major A.	0	8,760
Lambrecht, Paul R.	0	11,354
Lancaster, Sarah E.	39,627	2,378
Lane, Nancy M.	0	2,437
Lathan Jr., John F.	1,327	149
Lathan, Julia L.	125	125
Lawrence, Martha M.	0	9,264
Leaver, Edward S.	215,000	12,900
Lee, Gregory S.	204,499	12,270
Leehman, Nathan J.	0	13,400
Lekavich, Carolyn L.	0	1,664
Lenderman, Mark D.	0	11,769
Leonard, Jerry W.	0	3,840
Lepri, John J.	267,341	16,058
Lesley, Deborah W.	0	2,850
Levinson, Eric L.	124,108	7,446
Lew, Marci R.	0	7,705
Lewis, Paul F.	71,100	4,266
Libby, Lisa A.	74,524	4,471
Lindsey, Martin G.	454,773	27,286
Lines, David H.	27,610	5,522
Lockwood Joseph W.	111,360	6,682
Long, Robin R.	29,910	3,575
Lopez, Richard D.	58,116	3,487
Louv, William C.	0	17,671
Lovelett, Roger W.	0	4,376
Lowe, Paul J.	28,000	2,632
Lowery, Kenya J.	32,111	23,000
Ludeman, Clayton P.	0	7,007
Lumpkin, Willis G.	0	11,785
Lunsford II, Lowell T.	0	5,210
Lunsford, John H.	207,232	12,434
Lurie, Scott N.	47,900	2,874
Lyle, Mary L.	0	3,688

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Machen, Naudain L.	36,228	7,246
Maher, Thomas K.	0	2,015
Malhoit, Gregory C.	0	596
Marburger, Michelle R.	10,000	2,000
Marlowe-Roger, Jared J.	113,000	6,780
Martin, Carlyle B.	70,150	7,877
Martin, John R.	0	7,838
Masem, Alexandra	26,735	1,604
Massenburg, Barbara S.	0	1,500
Massey III, William G.	0	4,221
Mather III, Richard C.	108,053	6,483
Matory, James L.	0	24,330
Matthews, Gregory R.	7,805	5,500
Matthews, Hazel B.	0	3,358
Matthews, Richard A.	167,457	10,047
Matthews, Scott	146,000	8,760
Mayes, Edward K.	0	17,249
Mays, Rhett C.	0	5,680
Mcberkowitz, Melissa E.	140,629	28,126
McCall, Paul J.	0	3,090
McCall, Stuart A.	35,000	2,100
McCallister, Steven K.	0	7,474
McCarraher, Donna R.	0	5,094
McClary Carrie H.	65,720	3,943
McClernon, Francis J.	0	11,165
McCraw, William S.	0	3,420
McDonough, Michael J.	240,138	9,606
McGarry, Denis G.	700,000	75,618
McKay, Henry F.	227,000	45,400
McKearn, Thomas J.	0	26,618
Mckenzie, Colin S.	357,145	21,429
McKillop, Robert H.	0	3,928
McLean, William C.	233,912	14,035
McLester, Ralph J.	0	7,622
McMahon, Thomas J.	0	4,121
McNeill, Deborah H.	105,000	6,300
McNeill, Robert B.	0	2,806
Mead, William A.	0	8,100

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Mebane III, John G.	0	5,822
Meck, Warren H.	0	12,145
Melo, Jim	0	3,273
Mercer Mark S.	35,000	5,600
Metzloff, Thoma B.	0	17,166
Meyer, Paul A.	0	5,966
Michael, Autumn R.	0	9,000
Michel, Kirk W.	580,253	34,815
Miller III, Jesse E.	0	7,422
Miller, Chad M.	0	2,190
Millinor, Stephen R.	500	100
Mirman, Steve A.	0	1,500
Mitchell, Olds S.	38,316	7,031
Mitchell, Thomas O.	0	4,455
Monge, Ronald G.	24	24
Monroe III, Thomas C.	0	3,986
Moon, Christina R.	65,276	3,917
Moore Jr., Amos L.	0	23,925
Morgan, Dustin A.	585	35
Morgan, Kevin J.	129,200	5,857
Mosier, Erin K.	0	14,378
Moy, Allison J.	42,746	2,565
Mulholland, James	87,860	5,272
Munro, Julie B.	0	10,293
Murchison, John H.	107,300	6,438
Musser, R Clayton	0	18,106
Mylet, Thomas J.	6,300	7,560
Nelson, Soren R.	62,937	3,776
New, Rebecca	0	7,092
Nicholson, Jenny D.	180,940	10,856
Nightingale, David W.	0	13,976
Nonoy, Nathaniel P.	0	2,990
Norman, Gerald R.	75	75
North, Brenda J.	1,200	100
Nowakowski, Krista T.	43,978	2,639
Nutter, David G.	0	3,896
O'Brien, John B.	0	4,115
O'Brien, Kevin A.	200,000	24,000

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
O'Day, Gail R.	322,043	19,323
Oder, Michael S.	158,320	9,499
O'Grady, Kevin J.	0	1,883
Olinger, Robert W.	0	5,632
O'Meara, Wendy P.	149,780	8,987
Orso, Matthew E.	37,631	7,526
Osteen, Kathryn	0	4,134
Ostwalt, Matthew S.	26,353	1,581
Owen, Elizabeth	0	7,000
Owen, Timothy W.	0	3,803
Owens III, Ambrose L.	0	6,960
Owens, Janice E.	0	504
Paine, Jeffrey L.	0	19,845
Palmer, Jonathan C.	116,286	6,977
Parker, David R.	96,965	79,447
Parker, Teresa D.	3,000	1,500
Parrella, Kenneth R.	97,872	29,362
Parsons, Alton E.	95,078	5,705
Patel, Ajay	27,268	3,873
Patten, Aaron C.	97,000	5,820
Patterson, Timothy J.	101,865	6,112
Pauwels, Jean	0	6,335
Peay, Craig M.	95,000	6,842
Pegg, William T.	70,000	4,200
Pelton, Lee H.	0	7,221
Perry Jr., Robert E.	0	2,396
Perry, L Madison	0	8,177
Peterson, Charles T.	48,000	2,880
Pfeiffer, Ross D.	0	4,248
Phelan, Jennifer N.	0	3,875
Phelps, York D.	0	8,496
Phillips, Kevin O.	48,237	2,894
Phillips, Marc B.	0	3,405
Phinney, David A.	45,000	45,000
Pierce, Paul E.	30,914	1,855
Pitt, Jesse M.	290,000	17,400
Pizer, William A.	173,726	10,424
Plescia, Marcus	168,343	10,101

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Pogoloff, Stephen M.	147,790	8,867
Porter Jr., Thomas J.	0	13,980
Porter, Beverly	600	200
Powers, James N.	0	5,984
Pratt, Tracy E.	0	28,646
Premakumar, Sanjay K.	87,323	5,239
Preston, Sean M.	6,000	6,000
Pritchett, Laura G.	0	1,899
Purcell, Sarah H.	44,266	8,853
Quinones, Aaron K.	200	200
Ransdell III, William G.	0	4,126
Ranson, David L.	819	819
Ray, David S.	396,000	79,200
Rearick, Daniel J.	101,072	6,064
Reese, Brandon D.	2,500	2,500
Rex, Ted	233,328	14,000
Reynolds, Joshua E.	0	4,860
Richey, Russell E.	0	2,633
Ridpath, Edward A.	155,884	7,992
Riemann, Neil A.	0	1,794
Rigsbee, Arnold W.	0	27,935
Rist, Carl F.	0	3,645
Rivelli, Sarah K.	220,448	13,227
Rivers, Bobby C.	900	700
Rivers, Roslyn H.	400	100
Roberts Jr., Gary H.	0	780
Rodewald, Frederick E.	320,403	19,224
Roemer, Victoria	212,178	12,730
Rose, Kenneth J.	30,627	1,837
Saba, Roy J.	0	15,226
Sampson, Charles A.	5,000	5,000
Sandler, Aaron J.	138,402	8,304
Sathoff, Richard L.	111,000	6,660
Sauls, Randall M.	115,540	6,932
Saye, Stephen A.	0	40,540
Scarboro, David E.	0	25,633
Scarborough Jr., James I.	0	12,459
Scarvey, David C.	0	2,520

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Scheider, Nicholas J.	0	2,700
Schlekat, Christian E.	261,328	15,680
Schmidt, David J.	208,000	41,600
Schout Jr., James W.	0	9,086
Schram, Michael Y.	463,820	27,829
Schwab, Gary L.	39,900	2,394
Seipel, Richard A.	0	4,423
Seman, Joseph J.	26,561	5,312
Setliff, Paul A.	1,675	1,675
Setzer, Joseph E.	0	2,070
Sherck, Steven	600,000	36,000
Shields, Ian B.	0	4,873
Shuping Russell, Sallie	0	17,033
Simmons, Timmy E.	0	1,649
Sims, Dawn C.	250	200
Sims, Gregory	200	200
Singleton, Allen W.	233,785	7,013
Sirota, Brent	33,310	1,999
Sittema, Nathaniel D.	199,500	11,970
Smith Jr., Edward C.	0	344
Smith, Christopher B.	0	34,134
Smith, David B.	619,000	37,140
Smith, Edward C.	0	11,002
Smith, Herman E.	155,000	9,300
Smith, Narradeau	200	347
Snyder, Thomas M.	0	8,849
Snyderman, Theodore B.	0	3,998
Solomon, Sheryl J.	24,785	4,957
Sopper, John R.	0	5,269
Spinello, Kim M.	0	17,545
Spitz, Adam	0	4,200
Spring, Natalie R.	275,000	16,500
Sreenivasan, Gopal	0	26,026
Stamm, Louis	92,486	5,549
Staton, Matthew D.	0	4,405
Steed, Matthew W.	2,423	143
Steel, Benjamin M.	0	2,184
Stein, Steven S.	0	23,616

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Stephens, Donald R.	94,951	5,697
Stephenson, Laura M.	0	7,200
Stewart Jr., Roydel	48,518	14,555
Stewart, Andrew M.	0	6,348
Stewart, Nicole K.	207,049	20,705
Stewart, Pamela F.	45,820	2,749
Stohler, Hugh D.	0	11,788
Stone, Robbie D.	68,316	4,099
Strode, Barbara L.	0	27,000
Strong, Alan F.	0	5,700
Stroscio, Charles M.	105,000	21,000
Sturges, Conrad B.	0	27,376
Sugg, Andrew M.	0	1,604
Sugg, Samuel J.	0	46,450
Sutton, Turner B.	0	8,586
Swinney Jr., John G.	0	3,964
Tacey, April	15,960	5,586
Tammaro, John A.	0	12,192
Taylor Jr., James H.	3,245,438	194,726
Taylor, Melissa D.	1,000	1,000
Teague, Jason M.	0	2,632
Temple III, Earl J.	311,520	18,691
Thomas, William R.	0	1,922
Thompson, Jonathan C.	0	2,826
Thurston, Jason A.	206,800	12,408
Tilley, William L.	46,295	2,778
Tillman III, Rollie	0	9,672
Timmins, John P.	9,989	1,998
Tipton, Benjamin G.	0	103
Tocci, Peter N.	133,940	8,036
Todd, James C.	0	9,930
Todd, Shadrach O.	0	5,064
Todrin, Michael A.	10,000	10,000
Tomberg, James B.	390,000	23,400
Travis, Evan H.	0	1,620
Trichon, Benjamin H.	0	7,138
Truskey, George	168,697	10,122
Tuch, Shannon M.	0	3,690

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Turi, Jennifer L.	0	4,080
Tyson, Joseph B.	0	19,408
Van Deventer, Craig	195,287	11,717
Vance, Ronell C.	83,870	33,548
Vanderhoof, Cynthia L.	500	500
Vap, James G.	0	15,479
Vaughan, James E.	0	7,425
Vernon, Sheridan L.	1,167	408
Vickery, Brian P.	0	2,455
Vig, Deepak	300,000	18,000
Vogler, Robert C.	0	15,857
Walker, Jeffrey A.	250,850	15,051
Wall, Jeffery B.	27,961	1,678
Wallace, John R.	120,000	7,200
Wallis, Gregory B.	54,646	3,279
Ward, Cheryl A.	246,000	14,760
Ward, Henry C.	167,677	10,061
Ward, Marshall D.	0	4,217
Warner, Catherine R.	0	5,389
Washington, Pearlina	0	4,346
Watkins, William B.	22,266	1,336
Watson, Susannah C.	56,093	3,366
Wear III, Thomas R.	0	16,512
Weaver, Gary C.	167,629	16,658
Welter, James J.	0	2,535
West, Andrew Z.	16,618	2,493
Weston, Deron E.	117,222	7,033
Wheless, James H.	0	15,000
White, Ernest K.	100	50
White, James E.	0	700
Whittier, William A.	0	7,680
Wildman-Tobriner, Benjamin M.	0	11,691
Williams, Jonvonte	3,562	500
Williams, Quinn I.	0	5,335
Williams, Shelisha S.	5,987	741
Williams, Wesley	2,500	1,500
Williford, Joseph W.	204,329	12,260
Wilmoth, Thomas M.	46,235	9,247

Article 3D – Historic Rehabilitation Credits

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Wilson, John C.	0	11,923
Wilson, Timothy S.	0	2,184
Wilson, William F.	21,281	4,939
Winchell, Paul W.	94,827	5,690
Winner, Leslie J.	0	27,469
Woelkers, Christopher S.	0	14,094
Wolff, Michael	163,915	9,834
Wood, Nell	8,700	1,740
Woodell, Ashlyn D.	220	220
Woods, Christopher W.	0	12,270
Woomer Deters, Katharine B.	0	3,326
Wooten, Ursula T.	500	500
Worthy, Acey	0	10,200
Wrenn, James W.	85,417	5,125
Wyatt, James C.	200	200
Yaqub, Nadia G.	74,355	4,461
Yarboro, Douglas D.	0	9,377
York, Maurice C.	80,066	16,013
Young, Michael W.	1,460	121
Total Credits Taken	40,294,913	6,079,401

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 \$978,028.

Source: Revenue Research Section, Financial Services 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.