

North Carolina Department of Revenue

Historic Rehabilitation Credits

Article 3D

Returns Processed during Calendar Year 2017

Revised 4/30/2019

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Income-Producing Property (186 Taxpayers)		
Abrams, Douglas B.	0	15,383
Adams, Waylon L.	0	18,027
Alexander, Britta	6,000	25,878
Alvarado, Carlos V.	685	685
Arneson, Sarah M.	0	16,077
Arnold, Angela D.	0	4,254
Atlas, Todd	0	19,210
Bank of America Corporation	0	463,774
Barger, Mark A.	0	9,303
Beach, Jeffrey L.	0	7,511
Beans, Penny R.	500	100
Beck, Christine N.	62,500	2,500
Bengel, Steven L.	0	15,053
Bennett, Bradley R.	42,625	4,388
Benson, Farrad	50	50
Blalock, Dolan F.	81,690	16,338
Bland, William	0	115,000
Bohl, Robert D.	0	4,912
Booker, Ericson W.	0	40,449
Bowman, Robert B.	0	11,101
Branch Banking and Trust Company	0	336,132
Brim, Sammy J.	0	3,221
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
Bullard Jr., Maidson E.	0	4,470
Carrigan, Douglas W.	0	19,755
Cartwright, Stephanie C.	0	48,955

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Carver, Lawrence A.	41,312	1,652
Castillo, Sant	398	552
Cauley III, James P.	0	10,615
Chaden, Lee A.	0	899
Chadowitz, Jack	0	16,717
Chaney, Dawn S.	0	14,527
Chaplik, Ira	1,125	45
Chavonne, Anthony G.	0	11,554
Cheek, Clayton W.	0	4,275
Cline, James T.	0	43,742
Cordova, Kevin A.	1,267	787
Creighton, Charles A.	0	21,590
Crossman, Colin R.	0	10,993
Crow, Kenneth F.	0	9,562
Cullinan, Matthew S.	0	342,248
Curran, Tom	547,697	21,908
Depew, Henry C.	0	1,757
Dittmer, Joshua E.	0	12,600
Dunckle, Bruce L.	0	1,373
Dunn, Christopher J.	0	7,827
Edgerton, Billy Y.	0	17,425
Edwards, Donald J.	0	32,565
Elder, Tiffany	64,884	5,033
Ellett, Frank R.	0	46,215
Fanning, Paul A.	0	115,000
Fentress, Delbert R.	0	198,629
First-Citizens Bank & Trust Company	0	2,648
Fisher, Mark R.	0	6,447
Flock, Joseph E.	0	15,915
Flores, Diana	2,256	256
Fox, Brett A.	0	5,953
Fox, Marvin	75	75
Friesen, Jonathan E.	0	4,275
Frye, Pamela D.	0	11,473
Garcia, Silma V.	732	785
Gasch Jr., Kenneth A.	0	5,250
Gateway Management Services, LLC	0	34,200
Gillespie, David M.	5,395	215,673

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Goodnight, James A.	0	61,237
Graham, William	136,000	5,440
Greene, Kelly L.	176,358	19,879
Greene, Michael W.	0	8,159
Greyber, Daniel F.	0	5,823
Griffin, Margaret G.	5,000	500
Gurley, Robert S.	0	11,500
Haddad, Nicholas H.	0	5,092
Hakan, Michael J.	0	12,011
Hall, Jessica L.	0	2,500
Hall, William L.	47,935	9,587
Harmon, Jerald S.	0	10,639
Harris, Robert	0	1,124
Harrison, Denise L.	70,000	2,800
Hastings, Cindi	0	11,421
Hatem, George M.	0	1,752
Hatem, Gregory P.	0	14,903
Hatten, Debra T.	300	153
Healy, Shannon M.	0	3,536
Hedrick Realty and Inv. Co., Inc.	0	7,732
Henderson, Charles C.	0	3,149
Hill, Stephen B.	0	124,692
Hobbs III, Grimsley T.	0	2,579
Hobbs Jr., Grimsley T.	0	2,579
Hochberg, Larry J.	0	674
Hollingsworth, Daniel B.	0	7,555
Honeycutt, Stuart M.	170,000	10,200
Hornaday III, William D.	0	9,456
Hovis Jr., James R.	20,450	3,068
Howell, Holly M.	79,999	3,200
Hutchins, David R.	600	600
Jasper, Stacy L.	0	42,863
Joyner, Patrick	0	86,260
Kadis, Daniel S.	0	16,336
Kelly, Matthew R.	0	22,680
Kendall, Milton M.	0	4,260
Killingsworth, Paige H.	0	6,297
Knox, Tasha L.	100	75

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Laine, Peter H.	0	67,537
Lambeth, John E.	0	4,000
Lavin, Debra R.	0	1,305
Lavrischeff, Ricky L.	0	1,474
Lazarus, Michael	0	320
Lefkofsky, William	0	1,124
Lentin, Scott G.	621	25
Lindley, Kevin G.	0	4,816
Lindsay, Barry R.	1,000	1,000
Linton, Richard A.	100	100
Lipsky, Charles E.	81,685	16,337
Lipsky, Joshua N.	81,685	16,337
Little, Brian M.	149,871	8,992
Little, Walter R.	0	12,352
Makgill, Diane C.	52,263	2,091
Mangum, Debra D.	536	683
Mason, Paul F.	0	60,000
McClernon, Francis J.	0	11,165
McCulloch, Joseph E.	0	99,417
McDonald Jr., John C.	0	18,362
McFadyen Jr., William D.	0	12,825
Metcalf, Michael D.	0	1,370
Meyers, Sheldon J.	0	1,295
Moore, Jesse E.	1,489	1,489
Moscardini, Edward C.	177,000	11,700
Moscardini, Gian	177,000	11,700
Munoz, Estela	550	550
Naysmith, Donald R.	0	129,676
Neiman, Kenneth	0	1,691
Nelson, Edward K.	1,255	1,255
Nixon, Dale W.	0	2,000
Norwood, Carla M.	0	9,191
Oliver, George M.	0	4,275
Ortega-Carril, Damaso	0	1,236
Owens, Jerry	0	4,916
Pahl, Thomas H.	0	4,473
Parrott, Robert D.	0	4,652
Patten, Aaron C.	0	5,820

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Paynter, Stuart	27,389	5,478
Pelletier, Kenneth M.	0	1,348
Petrini-Poli, Charles E.	0	6,950
Pettit, William W.	0	33,279
Price, George B.	70,130	14,026
Princiotta, Thomas M.	0	5,469
Ransdell III, William G.	0	4,816
Rawlings, Demario L.	100	50
Rees, Floyd E.	103,242	12,359
Reilly, John P.	81,685	16,337
Rempel, Kassandra L.	0	341
Rivers, Bobby C.	0	275
Rivers, Charlie J.	678	254
Roberts Jr., Gary H.	0	780
Robertson, Ann	0	27,492
Rogers III, Arthur H.	0	34,401
Romeka, Michael H.	1,250	1,250
Ryding, Jeffrey L.	0	718
Samia, Mark A.	0	31,620
Scarborough, David C.	0	14,946
Schell, Marshall P.	0	5,458
Schmidlin III, Walter A.	0	16,340
Shubert, Fern H.	0	7,309
Sitton, David E.	180,000	11,575
Stanton, Melode A.	15	10
Starkey, Brian H.	0	2,519
Suer, Lucas J.	0	868
Swartzel, Richard A.	0	120,421
Sylvester, Leon W.	0	55,101
Taschuk, Myron J.	0	3,062
The Sherwin-Williams Co.	0	979,387
Tibbs, Sheri R.	4,000	1,000
Tolstykh, Alex Y.	75,000	75,000
Tonsmeire, William	0	8,800
US Bank National Association	32,804,871	2,624,388
Vining, William	0	56
Walker III, Samuel A.	0	18,628
Wiesner, David C.	27,157	5,111

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Williams, Joseph	0	22,639
Williams, Norman C.	0	18,088
Woelkers, Christopher S.	0	11,792
Wooten, John M.	0	4,652
Wrinn, Stephen J.	0	10,829
Total Credits Taken	35,666,505	7,817,662

Non-Income-Producing Property (529 Taxpayers)

Adams, Geoffrey W.	0	1,917
Adolphsen, Jeffrey D.	0	6,581
Allis Jr., Guy E.	0	6,665
Alphin, William J.	0	6,484
Anderson, William E.	0	4,590
Andrews C. S.	0	2,950
Armento, Anthony F.	0	11,239
Armfield, Shannon M.	0	2,160
Arnold, Martha S.	0	1,963
Babson, John C.	0	6,120
Bagley, Marjorie H.	0	4,020
Baldrige, Jacob D.	0	3,972
Balla Jr., Joseph	0	9,347
Ballantine, William C.	0	16,134
Banks, William D.	0	16,363
Barabash, Igor M.	45,500	3,900
Bardolph Jr., Richard	0	3,584
Barger, Nora S.	0	10,571
Barker, James M.	0	1,656
Barnes, Gregory B.	0	5,371
Barron, Walter J.	0	5,100
Barwick, Arnold	0	24,079
Beach, Ivan T.	0	3,300
Becker, Daniel L.	0	6,899
Beckett, Daniel H.	0	3,480
Beddingfield Jr., Markel C.	0	5,250
Bennett, Becky J.	0	1,911
Bernstein, Joshua E.	0	1,650

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Bickford Jr., David M.	0	5,241
Billeaud, Jody G.	0	6,757
Bishop, John A.	0	74,502
Bland, Charles E.	0	5,180
Boarati, Mary S.	0	3,732
Bode, Brian D.	0	11,061
Boeker, Thomas W.	0	14,250
Boelhower, Mary E.	0	5,401
Boggs, Eric T.	0	6,645
Bond, Alvin H.	300	500
Bondell, Howard D.	0	24,580
Boner, Justin R.	0	6,591
Booker, Matthew	0	2,198
Bortiri, Esteban	0	3,305
Boyce, Michael A.	0	6,147
Bozik, Daniel S.	0	15,600
Bradford, Scott	0	2,760
Brady, Brad D.	0	13,800
Brandon, Tonya L.	0	5,010
Brawley Jr., Daniel L.	0	3,480
Broadfoot, John W.	0	7,679
Broccolo, Nicholas	0	8,100
Brockmann, Todd C.	0	2,294
Brouwer, Kevin S.	0	2,550
Brown Jr., Frank R.	0	7,500
Brown, Deborah U.	0	2,078
Brown, Joy J.	0	14,244
Brown, Thomas E.	0	7,020
Bruin, Martinus N.	0	3,346
Bryan, Colin D.	0	3,965
Bryce, Scott T.	0	5,137
Bullard Jr., Maidson E.	0	2,442
Burckley, William J.	0	39,000
Bussey, Doyle M.	0	7,090
Byrum, Jill Q.	0	5,623
Cage, Jonathan B.	148,600	44,580
Calvert, John J.	0	13,941
Caplinger, Mary Anne G.	0	11,045

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Carpenter, John M.	0	9,240
Carr, Jonathan P.	0	3,882
Carreker, Justin M.	0	3,644
Carter, Jenna C.	15,134	4,324
Chaney, Dawn S.	0	3,388
Chappel, James G.	0	2,210
Chung, Richard J.	0	7,752
Chupkowski, Linda C.	0	13,383
Churchill, R. E.	0	4,800
Clabaugh Jr., David M.	0	3,420
Clevenger, John G.	0	6,072
Coats, Eve C.	0	3,751
Cohen, David A.	4,352	12
Cole, Glenn	0	14,504
Cole, Stephen N.	0	13,566
Collie, Jeffrey B.	18,000	5,880
Collie, Peyton E.	0	2,292
Colvin Larry G.	0	2,671
Copeland, Daniel W.	0	2,997
Cordell, Jill C.	0	10,899
Cormier, Trenton J.	0	8,400
Covington, Christopher G.	0	6,372
Cox, Edwin	0	9,510
Craft, Daniel C.	0	5,297
Craig, Matthew W.	0	5,995
Crandall, Russell C.	0	5,000
Creamer, Marvin C.	0	2,687
Cribbins, Paul S.	0	8,778
Crockett, David F.	0	1,516
Crum, Mark D.	0	3,067
Cummins, Bradley K.	0	7,625
Cunningham, J. C.	0	7,772
Curl, Ira W.	0	1,929
Cusick, Steven M.	0	25,500
Dail Jr., Macon M.	0	24,524
Das II, Pranab K.	0	2,096
Davidson, Michael G.	0	3,126
Davis Jr., Gilbert P.	0	5,265

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Davis, Benjamin T.	0	11,174
Davis, Chris G.	0	1,856
Debellis, Jeffrey R.	0	24,725
Deihl, Joshua J.	0	9,462
Dekker, Tom S.	0	13,932
Delille, Marc A.	0	3,553
Deperlinghi, Jerome	9,000	9,000
Dephouse, Derek H.	0	4,121
Detar, David S.	0	19,046
Dewire, Thomas M.	0	11,510
Dietsche, WC	0	30,139
Dimaggio, Susan M.	0	18,005
Dixon Jr., Roy G.	0	34,062
Dixon, David L.	0	11,900
Dixon, Ricky M.	0	8,036
Dobbins, James W.	0	6,160
Donahue, Keith	0	6,330
Donley, Brian D.	0	4,024
Dorr, Alexandra	0	1,494
Dowling Jr., Roderick A.	0	3,906
Drum, Ethan L.	0	6,782
Dryden, Donald T.	0	17,770
Dryman, Terry D.	0	4,500
Dunham, Jeff	0	3,900
Eberle, Robert A.	0	3,146
Ebright, Leonard T.	0	6,353
Edgerton, Gregory E.	0	6,298
Efird, Brian H.	0	23,266
Egger, Louis D.	0	4,440
Elliot, Robert M.	0	4,080
Ellis Jr., Thomas D.	0	12,393
Ellis, Ralph E.	150	100
Emerson, Jared S.	0	12,516
Euler, Kurt L.	0	18,996
Evans, James G.	0	13,530
Ewen, Todd J.	0	15,058
Ezzell Jr., Borton E.	0	2,352
Fain, Daniel I.	0	5,472

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Falls, Tyler P.	0	12,810
Faulkner II, Woodson E.	0	11,370
Feduccia, John A.	0	3,442
Feldblum, Paul J.	0	4,920
Fentress, Delbert R.	0	7,945
Fingerhut, Joel D.	0	2,700
Fischer, Sheryl B.	11,400	684
Flynn, Brian	0	11,940
Flynn, Matthew K.	0	5,460
Foltz, Joshua N.	0	7,500
Forsthoefel, Ann	0	4,140
Fox, Andrew C.	0	2,100
Frazier, Jacqueline L.	175	175
Frederick, Christopher T.	0	25,020
Freiberger, John J.	0	17,448
Froehlich, John J.	0	9,600
Furr IV, James E.	42,356	3,703
Futrell II, Chip G.	0	12,459
Garafola, Lesley E.	0	5,301
Gardner, Jared E.	0	4,006
Gayer, Charles K.	0	31,451
Gaylor IV, Charles P.	0	11,970
Gershenhorn, Jerry B.	0	4,324
Gilliam, Marita H.	0	1,920
Glazer, Patti L.	0	3,152
Glickfeld, Lindsey L.	0	12,896
Gligorovic, Predrag V.	0	15,420
Goforth, Brady H.	53,780	3,227
Goldman, Glenn J.	0	1,500
Goldman, Robert	19,000	1,140
Goldschmidt, Rudolp	67,500	10,125
Goode, Lindsey B.	0	3,694
Goodwin, Mary W.	0	1,936
Gordon, Charles D.	0	23,960
Gotwalt, Jessica W.	0	44,637
Green, Isaac H.	0	9,985
Griffin, Margaret G.	5,000	100
Griffin, Susan F.	0	11,961

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Grillo, Samantha	0	11,994
Grimes, Jeffrey L.	0	1,641
Grodsky, Irl B.	0	225
Gromlovits, Richard A.	0	5,160
Gros, Francois	0	13,410
Gruener, James W.	0	5,863
Guetler Jr., Joseph E.	30,880	1,853
Guyton, Heather L.	0	500
Haenni, Mary E.	0	3,560
Hall, Randall C.	0	2,994
Hammond Green, Margaret E.	0	1,795
Hanbury, Mary R.	0	2,808
Hardingpaul, Patricia A.	0	5,094
Harper Jr., Roger C.	0	16,506
Harrell, Catherine N.	0	29,577
Harris, Angela D.	0	700
Harrison, Frank S.	0	3,997
Harvey, Bradley	0	4,200
Hatch, George L.	0	1,800
Hatem, George M.	0	1,500
Hatem, Gregory P.	0	22,351
Hatton, Joshua K.	0	2,700
Hawfield, Wesley R.	0	7,380
Haws, John C.	0	16,000
Hayden, Kimberly H.	0	35,245
Haynes, Harrison E.	0	9,480
Hazelrigg, Maak D.	0	11,135
Healy, Shannon M.	0	3,030
Heeks, Robyn W.	0	11,051
Herst, Lawrence A.	0	5,567
Heu, William	0	2,984
Hicks, William A.	750	750
Hinson, Melissa L.	0	3,665
Hobbs, Matthew W.	265,020	15,901
Hodge, Michael C.	0	2,699
Holder Jr., Fred A.	0	1,704
Holderness, Howard	0	13,500
Holliday, Michele K.	0	1,980

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Holman Jr., Robert F.	100	100
Horinko, Mark	0	18,343
Hornaday III, William D.	0	8,101
Horsley, Eric F.	0	15,181
Hoty, Antony P.	0	9,686
Houde, Joseph F.	0	8,133
Howard, James M.	0	9,844
Howell, Holly M.	40,000	2,400
Hoyt, Richard L.	0	3,180
Huckabee, Charmaine M.	0	3,922
Hudgins, Verna E.	0	2,440
Huffstetler, Palmer E.	0	4,155
Hullihan, James R.	0	5,065
Hunt, James C.	0	29,070
Hyman, Ethan D.	0	6,270
Ireland, Frederick	0	2,640
Iverson, Terry R.	0	9,228
Jackson, Aquil G.	212	1,200
Jacobs, Tonya E.	0	6,449
Jacobs, Windy L.	0	6,449
Jacobson, Jill D.	0	9,900
Jacobson, John R.	0	4,289
James Jr., Roger A.	0	32,587
James, Daniel P.	0	2,160
Johnson, David D.	0	75,788
Johnson, Elizabeth N.	72,000	6,072
Johnson, Jon C.	0	8,700
Johnson, Samuel B.	0	2,871
Jones, Raymond C.	0	15,000
Jones, Steven S.	0	4,810
Jordan, Jacqueline S.	0	3,938
Joyner, Cheryl D.	0	6,220
Kane, Richard L.	0	3,658
Kasefang, Curtis A.	0	3,817
Kaufman, Mark A.	0	12,600
Kay, Jeremy N.	0	4,000
Kelly, Debra A.	0	7,140
Kelly, Elinor H.	0	2,470

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Kelly, Karida S.	1,649	1,649
Kempton, Patricia S.	0	2,880
Kendall Jr., Robert E.	0	7,196
Kenyon, Garreth J.	0	1,500
Kingsley, Sean	0	2,939
Kirk, Robin A.	33,690	2,021
Kirsh, Carolin S.	26,350	2,740
Kite, Jamie G.	0	2,280
Kittrell III, Robert G.	0	3,113
Kittrell, Bennett	0	103
Kittrell, Robert	0	103
Knauf, Mary E.	0	8,035
Kneile, Uwe	0	22,387
Knott, William M.	0	8,940
Knox, Madison R.	0	5,055
Kober, Tyler C.	0	4,936
Lackery, Major A.	0	8,760
Lambrecht, Paul R.	0	11,354
Lancaster, Sarah E.	0	2,378
Lascelles, Benedict D.	150,000	22,500
Lee, Gregory S.	0	12,270
Lekavich, Carolyn L.	0	1,664
Lenderman, Mark D.	0	11,769
Leonard, Jerry W.	0	3,840
Lepri, John J.	0	16,058
Lesley, Deborah W.	0	2,850
Levene, Keith M.	0	1,620
Lew, Marci R.	0	7,705
Lewis, Paul F.	0	4,266
Libby, Lisa A.	0	4,471
Lindsay, Barry R.	500	250
Lindsey, Martin G.	0	27,286
Lines, David H.	0	5,522
Lockwood, Joseph W.	0	6,682
Long, John P.	0	17,400
Lopez, Richard D.	0	3,487
Louv, William C.	0	17,671
Lowe, Paul J.	0	5,600

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Ludeman, Clayton P.	116,790	7,007
Lumpkin, Willis G.	0	11,785
Lunsford II, Lowell T.	0	5,210
Lunsford, John H.	0	12,434
Lurie, Scott N.	0	2,874
Machen, Naudain L.	0	2,174
Maher, Thomas K.	0	2,015
Malhoit, Gregory C.	0	551
Marburger, Michelle R.	0	2,000
Martin, Carlyle B.	0	7,877
Martin, John R.	0	300
Masem, Alexandra	0	2,629
Mason, Erica M.	28,935	1,736
Mather III, Richard C.	0	6,483
Matthews, Gregory R.	0	3,983
Matthews, Hazel B.	0	2,837
Matthews, Scott	0	8,760
Mayes, Edward K.	0	17,249
Mays, Rhett C.	0	5,680
McBerkowitz, Melissa E.	0	28,126
McCall, Stuart A.	0	2,100
McCallister, Steven K.	0	9,000
McCarragher, Donna R.	0	3,636
McClure, Archibald	0	5,455
McDonough, Michael J.	0	9,606
McGarry, Denis G.	0	42,000
McKay, Henry F.	0	9,080
McKenzie, Colin S.	0	21,429
McKillop, Robert H.	0	3,928
McLean, William C.	0	14,034
McLester, Ralph J.	0	4,884
McMahon, Thomas J.	0	4,121
McNeill, Deborah H.	0	6,300
Mebane III, John G.	0	5,822
Melo, Jim	0	3,273
Metzloff, Thomas B.	0	17,166
Meyer, Paul A.	0	5,966
Michael, Autumn R.	0	9,000

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Michel, Kirk W.	0	34,815
Midkiff, Paul A.	107,151	7,440
Miller III, Jesse E.	0	6,127
Miller, Chad M.	0	2,190
Mirman, Steve A.	0	1,500
Mitchell, Olds S.	0	2,438
Monroe III, Thomas C.	0	3,986
Moon, Christina R.	0	2,547
Moore, Amos L.	0	23,925
Morgan, Kevin J.	0	7,752
Mosier, Erin K.	0	14,378
Moy, Allison J.	0	2,565
Mulholland, James	0	5,272
Murchison, John H.	0	6,438
Musser, R. Clayton	0	42,077
Mylet, Thomas J.	0	3,780
Napp, David A.	0	3,632
Nelligan, Myles	0	1,610
Nelson, Soren R.	0	3,776
Nicholson, Jenny D.	0	10,856
Nofsinger, Roger B.	0	7,476
Nofsinger, Roger B.	0	7,476
Nonoy, Nathaniel P.	0	2,990
Nowakowski, Krista T.	0	2,639
O'Brien, John B.	0	4,156
O'Brien, Kevin A.	0	12,000
Oder, Michael S.	0	9,499
O'Grady, Kevin J.	0	1,883
Ohlsson-Shepherd, Jonathan A.	3,555	3,555
Olinger, Robert W.	0	5,632
O'Meara, Wendy P.	0	8,987
Orso, Matthew E.	0	7,526
Osteen, Kathryn	35,658	4,325
Ostwalt, Matthew	0	1,581
Outland III, Robert B.	56,100	11,220
Owen, Timothy W.	10,671	3,803
Owens III, Ambrose L.	0	6,960
Palmer, Jonathan C.	0	6,977

Article 3D – Historic Rehabilitation Credits – revised 4/30/2019

Taxpayer	Expenditures (\$)	Credit Taken (\$)
Parrella, Kenneth R.	0	9,786
Parsons, Alton E.	0	5,705
Patel, Ajay	0	5,491
Patterson, Timothy J.	0	6,112
Pauwels, Jean	0	3,424
Pawlik, Joseph R.	16,750	2,513
Peay, Craig M.	0	7,956
Pegg, William T.	0	4,200
Pennachio, Mark L.	750	750
Perry, L. Madison	0	8,177
Pfeiffer, Ross D.	0	4,248
Phelan, Jennifer N.	0	3,875
Phillips, Kevin O.	0	2,894
Pierce, Paul E.	0	1,855
Pizer, William A.	0	10,424
Plescia, Marcus	0	10,101
Pogoloff, Stephen M.	0	8,867
Porter Jr., Thomas J.	0	13,980
Powers, James N.	0	5,984
Pratt, Tracy E.	0	28,646
Premakumar, Sanjay K.	0	5,239
Profeta, Timothy H.	0	4,011
Purcell, Sarah H.	0	8,853
Ransdell III, William G.	0	4,126
Rawlings, Demario L.	100	50
Rawlins, Donald R.	0	1,984
Ray, David S.	0	79,200
Rearick, Daniel	0	6,064
Reese, Brandon D.	0	738
Rex, Ted	0	14,000
Reynolds, Joshua E.	0	4,860
Ribisl, Kurt M.	16,172	21,496
Richey, Russell E.	0	2,633
Ridpath, Edward A.	0	7,992
Rigsbee, Arnold W.	0	1,738
Rist, Carl F.	0	3,645
Ritchie, Baxter M.	0	58,260
Rivelli, Sarah K.	0	13,227

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Rivers, Bobby C.	490	330
Robbins, Barrett L.	77,700	4,662
Rodewald, Frederick E.	0	19,224
Roemer, Victoria	0	2,650
Saba, Roy J.	0	15,226
Sandler, Aaron J.	0	8,304
Sathoff, Richard L.	0	6,660
Sauls, Randall M.	0	6,932
Scarborough Jr., James I.	0	12,459
Scarvey, David C.	0	2,520
Schall, Elizabeth D.	0	2,271
Scheider, Nicholas J.	0	2,700
Schlekat, Christian E.	0	15,680
Schmidt, David J.	0	41,600
Schout Jr., James W.	0	9,205
Schram, Michael Y.	0	27,829
Schwab, Gary L.	0	2,394
Scott, Randall C.	0	29,958
Seipel, Richard A.	0	4,423
Seman, Joseph J.	0	2,986
Shaw III, Ralph H.	0	22,496
Sheffield Jr., Frank H.	0	3,265
Sherck, Steven	0	36,000
Shields, Ian B.	0	4,873
Shimron, Yonat	3,000	5,999
Shuping, Russell	0	17,033
Simmons, Timmy E.	0	1,649
Sims, Gregory	310	300
Singleton, Allen	0	7,013
Sirota, Brent	0	1,999
Sittema, Nathaniel D.	0	11,970
Smith, David B.	0	37,020
Smith, Edward C.	29,383	12,765
Smith, Herman E.	0	9,300
Smith, Janice L.	0	5,700
Snyder, Thomas M.	0	8,849
Snyderman, Theodore B.	0	3,998
Solomon, Mark J.	0	7,680

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Solomon, Sheryl J.	0	4,957
Sopper, John R.	0	5,269
Spinello, Kim M.	0	17,545
Spinello, Kim M.	0	2,545
Spitz, Adam	0	4,200
Spring, Natalie R.	0	16,500
Sreenivasan, Gopal	0	26,026
Stallings Jr., John W.	5,000	5,000
Stamm, Louis	0	5,549
Staton, Matthew D.	0	4,405
Steel, Benjamin M.	0	2,184
Stein, Steven S.	0	23,616
Stephens, Donald R.	0	5,697
Stephenson, Laura M.	0	7,200
Stewart, Andrew M.	0	6,348
Stewart, Nicole K.	0	20,705
Stinnett, Emma J.	74,057	80,000
Stohler, Hugh D.	0	5,970
Stone, Richard W.	124,730	7,484
Stone, Robbie D.	0	4,099
Strode, Barbara L.	0	27,000
Strong, Alan F.	0	5,700
Stroscio, Charles M.	0	21,000
Sturges, Conrad B.	0	27,376
Sugg, Samuel J.	0	46,450
Sutton, Turner B.	0	8,586
Swinney Jr., John G.	19,820	3,964
Taylor Jr., James H.	0	194,726
Teague, Jason M.	0	2,632
Thomas, William R.	0	1,922
Thurston, Jason	0	12,408
Tillery, Charles	48,260	3,948
Tilley, William L.	0	2,778
Timmins, John P.	0	1,998
Tomberg, James B.	0	23,400
Travis, Evan H.	0	1,667
Trichon, Benjamin H.	0	7,138
Truskey, George	0	10,122

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Tyson, Joseph B.	0	68,013
Van Deventer, Craig E.	0	11,717
Vance, Ronell C.	0	10,064
Vap, James G.	0	15,479
Vaughan, James E.	0	7,425
Vickery, Brian P.	0	2,455
Vig, Deepak	0	18,000
Walker, Jeffrey A.	0	15,051
Wall, Jeffery B.	0	1,678
Wallis, Gregory B.	0	3,279
Ward, Cheryl A.	0	14,760
Ward, Henry C.	0	10,061
Ward, Marshall D.	0	4,500
Washington, Pearline	1,458	3,729
Watkins, William B.	1,336	2,670
Weaver, Gary C.	0	12,071
Weiner, Martin J.	7,500	450
Welter, James J.	0	2,535
Weston, Deron E.	0	7,033
Whaley, John A.	0	66,499
Wheless, James H.	0	15,000
White, Robbie W.	650	650
Whitley Yvonne, Marie	0	6,092
Wildman-Tobriner, Benjamin M.	0	11,691
Williams, Quinn I.	179,400	5,738
Williams, Shelisha S.	2,499	2,499
Williford, Joseph W.	0	12,260
Wilmoth, Thomas M.	0	9,247
Wilson, John C.	0	11,923
Wilson, Justin A.	1,500	1
Wilson, Timothy S.	0	2,184
Wilson, William F.	0	2,470
Winchell, Paul W.	0	5,690
Winner, Leslie J.	0	26,787
Wolff, Michael	0	4,802
Woods, Christopher W.	0	12,270
Woomer Deters, Katharine B.	39,841	3,327
Wooten, Ursula T.	0	250

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Taxpayer	Expenditures (\$)	Credit Taken (\$)
Wrenn, James W.	0	5,125
Yaqub, Nadia G.	0	4,461
Yarboro, Douglas D.	80,108	4,806
Yeager, Ralph	0	15,193
York, Maurice C.	0	16,013
Young, Michael W.	0	187
Zauscher, Stefan	39,876	2,393
Total Credits Taken	2,190,948	5,005,706

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 \$190,921.

Revision note: After the original publication of this report on April 29, 2018, it was determined that 7 taxpayers in the “income-producing property” section of this report should have been reported under the Article 3L historic rehabilitation tax credits. These taxpayers have been removed from this report and have been added to the Article 3L reports. As a result, the amount of “Expenditures” reported for income-producing property has been reduced by \$10,858,500 and the amount of “Credit Taken” has been reduced by \$434,340 from the amounts previously published.

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 a prior year.