

North Carolina Department of Revenue

Historic Rehabilitation Credits

Article 3D

Returns Processed during Calendar Year 2020

| Taxpayer | Expenditures (\$) | Credit Taken (\$) |
|---|------------------------------|------------------------------|
| Income-Producing Property (90 Taxpayers) | | |
| Aikins, James C. | 0 | 614 |
| Alcira, Milouse J. | 0 | 1,523 |
| Alston, Jasmyn J. | 400 | 400 |
| Altizer, James W. | 0 | 4,400 |
| Andrews, Carcilece | 89,500 | 2,480 |
| Beach, Jeffrey L. | 0 | 7,511 |
| Beall, Jonathan B. | 26,140 | 5,228 |
| Bennett, Bradley R. | 0 | 4,388 |
| Bethea, Shykeimeon J. | 100 | 100 |
| Bettinger, Matthew | 0 | 862 |
| Bohl, Robert D. | 0 | 4,912 |
| Bridges, Julia M. | 4,000 | 4,000 |
| Brown, Commeka J. | 425 | 425 |
| Bullard Jr., Maidson E. | 0 | 4,470 |
| Cartner, Lisa C. | 4,874 | 975 |
| Carver, Lawrence A. | 0 | 1,652 |
| Cauley III, James P. | 0 | 10,614 |
| Cerruti, Michael J. | 261,478 | 15,689 |
| Chadowitz, Jack | 0 | 3,768 |
| Chavonne, Anthony G. | 0 | 11,554 |
| Crossman, Colin R. | 0 | 9,149 |
| Crow, Kenneth F. | 0 | 3,149 |
| Curran, Tom | 0 | 21,908 |
| Depew, Henry C. | 0 | 1,757 |
| Dixit, Nilesh A. | 300 | 300 |
| Dorty, Kiana | 100 | 100 |
| Edgerton, Billy Y. | 0 | 15,668 |
| Erwin, Virginia H. | 0 | 11,710 |
| Esposito, Mark J. | 1,000 | 1,000 |
| Fenwal, Inc. | 0 | 3,244 |
| Foster, Kevin A. | 0 | 915 |
| Futrell, Kathi L. | 100 | 100 |

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| Taxpayer | Expenditures (\$) | Credit Taken (\$) |
|-------------------------------|----------------------|----------------------|
| Gay, Nathaniel | 0 | 5,000 |
| Gillespie, David M. | 0 | 308,105 |
| Godwin, Catrina H. | 40,204 | 1,608 |
| Goldsmith Jr., Claude F. | 581 | 23 |
| Gray, Marion J. | 180 | 345 |
| Gray, William J. | 10,300 | 100 |
| Greene, Kelly L. | 0 | 7,054 |
| Greene, Michael W. | 0 | 8,159 |
| Hamilton, Chinetta M. | 1,200 | 1,200 |
| Harrison, Montiya L. | 50 | 200 |
| Hedrick Realty and Investment | 0 | 5,760 |
| Henderson, Charles C. | 0 | 3,142 |
| Hertzberg, Lily R. | 1,000 | 100 |
| Hill, Stephen B. | 0 | 857,235 |
| Hobbs, Matthew W. | 0 | 15,901 |
| Howell, Holly M. | 0 | 3,200 |
| Huckaby, Dustin | 1,237 | 1,237 |
| Jensen, Leesa A. | 60,506 | 2,420 |
| Johnson, Devin D. | 3,000 | 1,500 |
| Johnson, Richard D. | 0 | 3,235 |
| Joyner, Patrick | 19,525 | 781 |
| Kadis, Daniel S. | 0 | 3,974 |
| Kennedy, Christopher F. | 0 | 1,970 |
| Killingsworth, Paige H. | 0 | 6,297 |
| King III, Bruce F. | 29,128 | 4,369 |
| Kritikos, Nicholas | 500 | 505 |
| Laine, Peter H. | 0 | 67,537 |
| Leland, William J. | 10,010 | 3,725 |
| Lindsay, Barry R. | 1,500 | 1,500 |
| Little, Walter R. | 0 | 24,704 |
| Makgill, Diane C. | 0 | 1,985 |
| Marshall, Michelle R. | 4,000 | 200 |
| Messick, Mark A. | 770 | 770 |
| Michels, Rhonda B. | 0 | 10 |
| Miller, Clifford M. | 84,668 | 3,387 |
| Morris, Deborah Y. | 400 | 40 |
| Nixon, Dale W. | 0 | 8,792 |
| Orr, Cheryl R. | 243,562 | 33,731 |
| Phelps, Kesia S. | 0 | 200 |

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| Taxpayer | Expenditures (\$) | Credit Taken (\$) |
|--------------------------------|----------------------|----------------------|
| Ransdell III, William G. | 6,930 | 277 |
| Rees, Floyd E. | 0 | 4,130 |
| Rex, Ted | 0 | 14,000 |
| Rose, Jasmine | 0 | 15 |
| Roseboroughsuber, Caesarae | 1,056 | 1,056 |
| Routh Jr., William E. | 111,691 | 4,468 |
| Rowan Investment Company, Inc. | 71,519 | 14,304 |
| Schenk, Trista L. | 0 | 50 |
| Schmidlin III, Walter A. | 0 | 49,020 |
| Sherwin-Williams Co. | 0 | 127,732 |
| Sweeney, Walter J. | 298,184 | 4,175 |
| Terry, Byrone D. | 640 | 640 |
| Vriesema, Chad M. | 0 | 20,680 |
| Walker III, Samuel A. | 0 | 18,628 |
| Wilson, Ronald E. | 300 | 300 |
| Wood, Andrew D. | 300 | 10 |
| Wooten, Ursula T. | 500 | 500 |
| Wrinn, Stephen J. | 0 | 10,829 |
| Wymbs, Bryan E. | 0 | 58,828 |
| Total Credits Taken | 1,391,858 | 1,874,208 |

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 \$3,862.

Non-Income-Producing Property (143 Taxpayers)

| | | |
|--------------------|---------|--------|
| Andrews, Carcilece | 56,800 | 1,480 |
| Angell, Andrew N. | 0 | 786 |
| Becker, Daniel L. | 0 | 2,642 |
| Berg, Carl L. | 195,000 | 11,700 |
| Blazek, F. D. | 0 | 11 |
| Bloom, Pamela E. | 0 | 4,596 |
| Boarati, Mary S. | 0 | 3,732 |
| Boggs, Eric T. | 0 | 6,645 |
| Boner, Justin R. | 0 | 6,591 |

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| Taxpayer | Expenditures (\$) | Credit Taken (\$) |
|-------------------------|----------------------|----------------------|
| Boyce, Michael A. | 0 | 6,145 |
| Bozik, Daniel S. | 0 | 15,600 |
| Broadwater, Kevin M. | 0 | 10,441 |
| Brown, Commeka J. | 425 | 425 |
| Brownstead, Elizabeth | 3,120 | 624 |
| Bryson, John D. | 75,826 | 4,550 |
| Bullard Jr., Maidson E. | 0 | 2,442 |
| Cage, Jonathan B. | 0 | 17,832 |
| Capps, Relda A. | 500 | 500 |
| Carter, Jenna C. | 0 | 4,324 |
| Chupkowski, Linda C. | 0 | 13,383 |
| Cirillo, Melissa L. | 110,000 | 12,262 |
| Coleman Larry D. | 100 | 50 |
| Connor, Douglas M. | 500 | 500 |
| Cummins, Barry K. | 25,470 | 2,080 |
| Cummins, Bradley K. | 0 | 6,520 |
| Curran, Neal | 0 | 4,208 |
| Darby, Robert J. | 76,626 | 11,494 |
| Darrah, Harvey O. | 16,000 | 3,000 |
| Dawkins, Johnny L. | 75,500 | 4,530 |
| Debellis, Jeffrey R. | 0 | 6,425 |
| Delborne, Jason A. | 0 | 7,985 |
| Delille, Marc A. | 0 | 2,959 |
| Dimaggio, Susan M. | 0 | 5,402 |
| Dittmer, Joshua E. | 0 | 12,600 |
| Dorty, Kiana | 75 | 75 |
| Drum, Ethan L. | 0 | 5,351 |
| Dryden, Donald T. | 0 | 17,400 |
| Dryman, Terry D. | 21,150 | 1,269 |
| Ebright, Leonard T. | 0 | 3,928 |
| Elmore, Charles B. | 800 | 500 |
| Emerson, Jared S. | 0 | 12,516 |
| Enos, Jonathan N. | 0 | 7,015 |
| Esposito, Mark J. | 1,000 | 1,000 |
| Fleming, Alyson H. | 77,100 | 4,816 |
| Flynn, Brian | 0 | 11,940 |
| Frazier, Sharon W. | 0 | 2,128 |
| Futrell II, Chip G. | 0 | 24,918 |
| Garafola, Lesley E. | 0 | 5,301 |

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| Taxpayer | Expenditures (\$) | Credit Taken (\$) |
|-----------------------------|----------------------|----------------------|
| Gay, Nathaniel | 0 | 80 |
| Goforth, Brady H. | 0 | 3,227 |
| Gray, Marion J. | 2,300 | 3,456 |
| Green, Quahem D. | 0 | 300 |
| Guetler Jr., Joseph E. | 0 | 1,852 |
| Hall, Randall C. | 102,245 | 3,067 |
| Hallowell, Anne J. | 38,506 | 2,310 |
| Hamilton, Chinetta M. | 1,200 | 1,200 |
| Hanna, Scott | 25,000 | 3,750 |
| Harden, Sarah A. | 25,000 | 8,000 |
| Harris, Patricia A. | 0 | 500 |
| Hastings, Cindi | 0 | 2,547 |
| Hatem, Gregory P. | 0 | 22,351 |
| Hawthorne-Johnson, Nicholas | 640,000 | 38,400 |
| Haynes, Ralph L. | 226,450 | 13,587 |
| Heeks, Robyn W. | 173,131 | 10,388 |
| Hinton, Felicia R. | 500 | 500 |
| Hodges, Todd N. | 0 | 1,912 |
| Hopkins, Tara M. | 0 | 2,994 |
| Howell, Holly M. | 0 | 2,400 |
| Huckabee, Charmaine M. | 0 | 3,590 |
| Hullihan, James R. | 0 | 5,065 |
| Jones, Brian | 0 | 1,000 |
| Jones, Raymond C. | 0 | 15,000 |
| Keith, James A. | 0 | 2,609 |
| Kelly, Debra A. | 0 | 7,140 |
| Kenyon, Garreth J. | 0 | 1,500 |
| Kirsh, Carolin S. | 0 | 2,740 |
| Kneile, Uwe | 0 | 22,387 |
| Knox, Tasha L. | 185 | 185 |
| Konawalik, Bradley P. | 0 | 4,920 |
| Lindberg, Robert A. | 42,406 | 2,544 |
| Lopez, Richard D. | 0 | 3,487 |
| Lowe, Paul J. | 0 | 5,600 |
| Lucas, Jamel L. | 2,000 | 450 |
| Ludeman, Clayton P. | 0 | 5,999 |
| Lunsford, John H. | 0 | 12,434 |
| Main, Jeffrey C. | 25,124 | 1,507 |
| Marburger, Michelle R. | 0 | 1,000 |

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| Taxpayer | Expenditures (\$) | Credit Taken (\$) |
|----------------------------|----------------------|----------------------|
| Massey III, William G. | 56,561 | 6,931 |
| Massey, Alphonzo L. | 0 | 500 |
| Matthews, Richard A. | 0 | 40,189 |
| McClendon, Kara L. | 0 | 2,628 |
| McLean, William C. | 0 | 14,035 |
| McLester, Ralph J. | 81,404 | 831 |
| Menaker, Steven A. | 250,000 | 15,000 |
| Metzloff, Thoma B. | 0 | 10,409 |
| Mongold Jr., George | 28,000 | 656 |
| Morris, Deborah Y. | 400 | 40 |
| Navarro II, Peter | 18,000 | 1,000 |
| New, Rebecca | 0 | 4,490 |
| O'Brien, Carrie H. | 0 | 24,000 |
| Orr, Cheryl R. | 237,562 | 14,254 |
| Outland III, Robert B. | 0 | 3,366 |
| Patten, Thomas N. | 39,135 | 2,348 |
| Peay, Craig M. | 0 | 9,216 |
| Piper, Ivona M. | 26,000 | 1,560 |
| Pogoloff, Stephen M. | 0 | 4,319 |
| Preston, Sean M. | 30,000 | 6,000 |
| Prince, Francesca | 0 | 4,490 |
| Redding, Shirley | 0 | 1,000 |
| Rich, Simon B. | 213,200 | 12,792 |
| Riley, Thomas M. | 3,141 | 1,500 |
| Rivelli, Sarah K. | 0 | 13,226 |
| Rodewald, Frederick E. | 0 | 19,224 |
| Roseboroughsuber, Caesarar | 40,000 | 40,000 |
| Scarborough Jr., James I. | 0 | 24,918 |
| Schieren, Charles W. | 0 | 12,000 |
| Schram, Michael Y. | 0 | 27,829 |
| Seipel, Richard A. | 44,225 | 1,273 |
| Setliff, Paul A. | 0 | 2,767 |
| Sims, Gregory | 200 | 200 |
| Smith, Edward C. | 0 | 1,763 |
| Smith, Kevin M. | 6,000 | 6,000 |
| Stewart, Monet | 0 | 1,250 |
| Stewart, Nicole K. | 0 | 20,705 |
| Stone, Richard W. | 0 | 7,484 |
| Stoneburner, Stephen | 0 | 5,000 |

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| Taxpayer | Expenditures (\$) | Credit Taken (\$) |
|-----------------------|----------------------|----------------------|
| Stover, Phillip E. | 0 | 2,557 |
| Stroschio, Charles M. | 0 | 9,450 |
| Swinney Jr., John G. | 0 | 645 |
| Terry, Byrone D. | 0 | 1,300 |
| Treadway, Paul J. | 1,500 | 1,500 |
| Vance, Ronell C. | 0 | 10,064 |
| Wakefield, David H. | 22,000 | 10,000 |
| Wallis, Gregory B. | 0 | 3,279 |
| Watkins, William B. | 5,334 | 2,670 |
| Whitley Yvonne, Marie | 0 | 3,441 |
| Wiehe, Kevin | 115,125 | 15,000 |
| Winchell, Paul W. | 0 | 5,690 |
| Wise, Tierra L. | 0 | 300 |
| Yarboro, Amanda M. | 0 | 2,403 |
| Yarboro, Douglas D. | 0 | 4,806 |
| Zauscher, Stefan | 0 | 2,393 |
| Zurawski, Kathy B. | 1,500 | 8,880 |
| Credits Taken | 3,259,326 | 964,170 |

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’ for individual income taxpayers in this report are the installment amount reported by the taxpayer on Form D-400TC.

‘0’ in the Expenditure column indicates that the expenditures were 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.

Source: Revenue Research Section, Financial Services Division, North Carolina Department of Revenue