

North Carolina Department of Revenue
William S. Lee (Article 3A) Tax Credits

Details of Credits Taken by Taxpayer
Returns Processed during Calendar Year 2022

Taxpayer	Research & Dev. (3A) (\$)	Tech. Comm. (\$)	Substantial Investment (\$)	Total Taken (\$)
Energizer Manufacturing, Inc.	146,152	0	0	146,152
Fleming, Leroy	2	0	0	2
Haulerback, Inc.	100	0	0	100
Housatonic Investors, LLC	0	0	691	691
JMO Holdings	3,285	0	0	3,285
Johnson Controls US Holdings, LLC	1,007	0	0	1,007
Louisiana-Pacific Corporation	74,000	0	0	74,000
Schaefer Systems International, Inc.	27,713	0	0	27,713
Troxler Electronic Laboratories, Inc.	415	0	0	415
Wheatstone Corporation	5,748	0	0	5,748
York International Corp.	853	0	0	853
Total Credits Taken	259,275	0	691	259,966

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 amounts shown above by the following: "Research and Dev. (3A)" by \$450.

Procedural Notes: Information from taxpayer returns, including taxpayer errors and omissions, is shown as reported. All returns are subject to audit. Amounts for any one taxpayer may reflect credits taken in multiple years. Affiliated taxpayers are reported individually. Amounts may be adjusted for amended returns received during the current calendar year.

Source: Tax Research & Equity Division, North Carolina Department of Revenue