

# North Carolina Department of Revenue

## William S. Lee Tax Credits

### Details of Other Credits Taken

Processed during Calendar Year 2008

| <b>Taxpayer</b>               | <b>Technology<br/>Commercialization<br/>(\$)</b> | <b>Development<br/>Zone *<br/>(\$)</b> | <b>Substantial<br/>Investment<br/>(\$)</b> | <b>Total<br/>Taken<br/>(\$)</b> |
|-------------------------------|--|--|--|---------------------------------|
| Arnolt, Michael I.            | 0  | 0                                      | 113,509                                    | 113,509                         |
| Coupland, John B.             | 0  | 0                                      | 4,347                                      | 4,347                           |
| Creech Jr., Leonard R.        | 0  | 0                                      | 37   | 37                              |
| Daniels, Walter E.            | 0  | 0                                      | 3,125                                      | 3,125                           |
| John William Pope Foundation  | 0  | 23,917                                 | 0  | 23,917                          |
| Lowe's Home Centers, Inc.     | 0  | 0                                      | 2,714,056                                  | 2,714,056                       |
| McKinney, Larry A.            | 0  | 18,749                                 | 0  | 18,749                          |
| Muchnick, Daniel W.           | 0  | 0                                      | 11   | 11                              |
| R.J. Reynolds Tobacco Company | 0  | 11,472,313                             | 0  | 11,472,313                      |
| Silverstein, John M.          | 140  | 0                                      | 0  | 140                             |
| Sucherman, Stuart F.          | 0  | 0                                      | 520  | 520                             |
| Williamson, Charles D.        | 0  | 0                                      | 112  | 112                             |
| Worrell, Troy A.              | 2,750  | 0                                      | 0  | 2,750                           |
| <b>Total Credits Taken</b>    | <b>2,890</b>                                     | <b>11,514,979</b>                      | <b>2,835,717</b>                           | <b>14,353,586</b>               |

Source: Policy Analysis and Statistics Division, North Carolina Department of Revenue

\* Unable to separate the Development Zone Projects credit taken from the Other Tax Credits Subject to 50% Limit category.

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. Taxpayers who failed to identify their tier have been placed in the tier of their mailing address as reported to the Department of Revenue or as available from other sources.