

## Business Energy Tax Credit

# Application for Final Certification

1. When the project is finished, please complete this application.
2. Include verification of your project costs. Final certified costs may exceed preliminary costs by no more than 10 percent unless you have submitted your changes in writing and received approval before you completed your project.
  - If the final project costs are less than \$50,000, include copies of canceled checks (copy both sides) **or** the contractor's or vendor's invoices/receipts. If you send copies of the invoices/receipts, please make sure they are dated, clearly marked "PAID" and signed or initialed by the contractor or vendor or identified by store name.
  - If the project costs are \$50,000 or more, send a letter signed by a Certified Public Accountant (CPA) *who is not an employee of your business*. A sample CPA letter available on our Web site. ([www.energy.state.or.us](http://www.energy.state.or.us))
3. If the equipment is leased, include a copy of the lease.
4. Subtract any federal grants or gifts from the project costs to arrive at the eligible project costs. Please note: Utility and local municipality incentives should **not** be deducted. If the total of your financial incentives and the tax credit exceed the total eligible project costs, please contact the Department of Energy at 1-800-221-8035.
5. Mail to: Oregon Department of Energy  
625 Marion St. N.E.  
Salem, OR 97301-3737

If the project is sold, traded or disposed in some way, or if the terms of a leased project have ended after you have received your Final Certificate, you must notify the Oregon Department of Energy in writing. Certification will be revoked, and the new owner may apply for the remaining tax credit.

**Questions?** Call the Department of Energy at 1-800-221-8035 (toll-free in Oregon) or (503) 378-4040 (Salem). Or visit our Web site ([www.energy.state.or.us](http://www.energy.state.or.us)).



# Business Energy Tax Credit

## Application for Final Certification

|                            |
|----------------------------|
| <b>For office use only</b> |
| Application #:             |
| Date received:             |
| Final certified cost:      |

|   |         |      |
|---|---------|------|
| <b>1. Location of project/equipment</b> |         |      |
| Business name:                          |         |      |
| Contact person:                         | Title:  |      |
| Phone:                                  | E-mail: |      |
| Site address:                           |         |      |
| City:                                   | County: | Zip: |

|                                  |  |  |
|----------------------------------|--|--|
| <b>2. Date project completed</b> |  |  |
|                                  |  |  |

|  |   |    |
|--|---|----|
| <b>3. Project cost</b>   |   |    |
| Final project costs  | <input type="checkbox"/> I have enclosed a CPA letter if final project costs are \$50,000 or more | \$ |
| Subtract any federal grants or gifts   |   | \$ |
| <b>Total eligible project costs</b> (The sum of all financial incentives and the tax credit may not exceed the total eligible project cost. Please contact the Department of Energy at 1-800-221-8035 if it does.) |   | \$ |

|  |                     |
|--|---------------------|
| <b>4. Tax credit recipient information</b> Read the statement below. If you agree to all points, complete, sign and date.  |                     |
| <p>I certify that the information in this application is correct. I have complied with all conditions of the Preliminary Certificate: ORS 469.185-225, 315.354, 315.356, and OAR 330-090-0105 to 330-090-0150. I grant to the Oregon Department of Energy permission to inspect the project for compliance with tax credit requirements either before issuing final certification or during the years in which a tax credit is being claimed. I agree that the final certification will be issued to the tax credit recipient(s) listed.</p> |                     |
| <b>Tax Credit Recipient A</b> (If additional recipients, list on page 2.)  |                     |
| Soc. Sec. or Tax I.D. #*:  | Tax credit share: % |
| Name:  | Title:              |
| Phone:   | E-mail:             |
| Mailing address:   |                     |
| City/state/zip:  |                     |
| Signature:   | Date:               |

| Tax Credit Recipient B    |                     |
|---------------------------|---------------------|
| Soc. Sec. or Tax I.D. #*: | Tax credit share: % |
| Name:                     | Title:              |
| Phone:                    | E-mail:             |
| Mailing address:          |                     |
| City/state/zip:           |                     |
| Signature:                | Date:               |
| Tax Credit Recipient C    |                     |
| Soc. Sec. or Tax I.D. #*: | Tax credit share: % |
| Name:                     | Title:              |
| Phone:                    | E-mail:             |
| Mailing address:          |                     |
| City/state/zip:           |                     |
| Signature:                | Date:               |
| Tax Credit Recipient D    |                     |
| Soc. Sec. or Tax I.D. #*: | Tax credit share: % |
| Name:                     | Title:              |
| Phone:                    | E-mail:             |
| Mailing address:          |                     |
| City/state/zip:           |                     |
| Signature:                | Date:               |

\*OAR 330-090-0130 authorizes the Oregon Department of Energy to use your federal tax identification or social security number as an identification number in maintaining internal records and may be shared with the Department of Revenue to establish the identity of an individual in order to administer state tax law. **If there are additional tax credit recipients, please attach a separate sheet.**

**Send completed application with verification of project costs to:**



625 Marion St. NE  
 Salem, OR 97301-3737  
 Fax: (503) 373-7806

If you have questions, call 1-800-221-8035 (toll-free in Oregon) or (503) 378-4040