

Business Energy Tax Credit Application for Final Certification

1. When the project is finished, the project owner should complete this application.
2. Include verification of your total project costs. Final eligible certified costs may exceed preliminary certified costs by no more than 10 percent unless you have submitted your project changes in writing and received approval from the Oregon Department of Energy before you completed your project. (Cost increases alone are **not** sufficient for the Oregon Department of Energy to issue a revised precertification.)
 - If the final total 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 final total 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.oregon.gov/energy)
3. If part of the project included equipment that is leased, include a copy of the lease in the cost verification.
4. Subtract any federal grants or gifts from the project costs to arrive at the total 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 final eligible project costs, please contact the Oregon Department of Energy at 1-800-221-8035.
5. The project owner must complete and sign the Project Owner Statement.
6. List the names and other information for all tax credit recipients. Each tax credit recipient must sign the Tax Credit Recipient Statement.
7. Mail the completed original application 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 the Oregon Department of Energy has issued the Final Certificate, the project owner must notify the Oregon Department of Energy in writing within 60 days of the event and before any additional tax credits are claimed.

Questions? For questions on claiming the tax credit, contact the Oregon Department of Revenue (www.oregon.gov/DOR) or call 1-800-356-4222.

Call the Oregon Department of Energy at 1-800-221-8035 (toll-free in Oregon) or (503) 378-4040 (Salem). Or visit our Web site (www.oregon.gov/energy).



Business Energy Tax Credit

Application for Final Certification

For office use only

Application #:

Date received:

Final certified cost:

1. Project information

Business name:

Contact person:

Title:

Phone:

E-mail:

Site address:

City:

County:

Zip:

2. Date project completed

3. Project cost

Final project costs I have enclosed a CPA letter if final project costs are \$50,000 or more \$

Subtract any federal grants or gifts \$

Total project costs \$

Preliminary certified cost of project (on your Preliminary Certification) \$

Final eligible project costs (can be no more than 10% over preliminary certified project costs)

Note: The sum of all financial incentives and the tax credit may not exceed the final eligible project costs. Please contact the Oregon Department of Energy at 1-800-221-8035 if it does. \$

(OVER)

4. Project Owner Statement

1. I certify that the information in this application is correct and I am the owner of this energy project. 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 understand that failure to grant an inspection is grounds for revoking a Final Certificate.
2. I understand that Oregon Department of Energy approval and certification of my project is for tax credit purposes only. The Oregon Department of Energy does not guarantee or in any way ensure the performance of any equipment, the quality of any system or the reliability of any dealer.
3. I will comply with the provision that the facility must operate in accordance with the representation made in the Application for Preliminary Certification. I understand that I must inform the Oregon Department of Energy in writing within 60 days and before any additional tax credits are claimed if the facility is sold, traded or disposed of in some way, or if the term of a leased facility has ended and that the Director will revoke the Final Certification.
4. I certify that the project complies with all local, state and federal requirements and I obtained all necessary permits.
5. I understand that this tax credit application is a public record and that Oregon Department of Energy may be required by law to disclose information in this tax credit application to the public on request. I have marked any information that I request be kept confidential. I understand that marking information does not guarantee that it will be kept confidential and that the Director of the Oregon Department of Energy will make any decisions regarding public disclosure of information contained in this application in accordance with the Oregon Public Records Law.
6. I understand that the Oregon Department of Energy does not endorse any company that requests information on this application and does not sell information as a mailing list.
7. I hereby release the State of Oregon and its commissions, agencies, officers, employees, contractors, and agents, and agree to defend and indemnify the foregoing from and against any claims, demands, or costs (including attorney and expert witness fees at trial and on appeal) arising from or in any way related to the Oregon Department of Energy's issuance or failure to issue any pre-certification or final certification for a Business Energy Tax Credit, or any party's inability to obtain a Business Energy Tax Credit.
8. I understand that the sum of all financial incentives for this project and the tax credit amount can not exceed the total eligible project cost.
9. I verify that the project owner does not restrict membership, sales, or services on the basis of race, color, creed, religion, national origin, sexual preference or gender.

Project Owner (Please print)

Business Energy Tax Credit #

Phone:

E-mail:

Mailing address:

City/state/zip:

I have read and agree with the terms and conditions of the Project Owner Statement.

Signature: _____ Date: _____

Printed Name: _____ Title: _____

5. Tax Credit Recipient Statement Please photocopy for each tax credit recipient

1. I understand that OAR 330-090-0130 authorizes the Oregon Department of Energy to use my federal tax identification or social security number as an identification number in maintaining internal records and may be shared with the Oregon Department of Revenue to establish the identity of an individual in order to administer state tax law.
2. I understand that the tax credit recipient must comply with Oregon Department of Revenue requirements to document that the credit has been appropriately assigned, allocated or transferred, and claimed, and that compliance is subject to audit.
3. I understand that this tax credit application is a public record and that Oregon Department of Energy may be required by law to disclose information in this tax credit application to the public on request. I have marked any information that I request be kept confidential. I understand that marking information does not guarantee that it will be kept confidential and that the Director of the Oregon Department of Energy will make any decisions regarding public disclosure of information contained in this application in accordance with the Oregon Public Records Law.
4. I understand that the Oregon Department of Energy does not endorse any company that requests information on this application and does not sell information as a mailing list.
5. I hereby release the State of Oregon and its commissions, agencies, officers, employees, contractors, and agents, and agree to defend and indemnify the foregoing from and against any claims, demands, or costs (including attorney and expert witness fees at trial and on appeal) arising from or in any way related to the Oregon Department of Energy's issuance or failure to issue any pre-certification or final certification for a Business Energy Tax Credit, or any party's inability to obtain a Business Energy Tax Credit.
6. I verify that the tax credit recipient does not restrict membership, sales, or services on the basis of race, color, creed, religion, national origin, sexual preference or gender.
7. I have completed this form to the best of my knowledge.

Tax Credit Recipient (Please print)		Business Energy Tax Credit #	
Soc. Sec. or Tax I.D. #:		Tax Credit share:	%
Name:			
Phone:			
Mailing address:			
City/state/zip:			
<input type="checkbox"/> I have read and agree with the terms and conditions of the Tax Credit Recipient Statement above.			
Signature:		Date:	