



HISTORIC PRESERVATION TAX CREDIT ASSIGNMENT APPLICATION

Attach a copy of the Historic Preservation Tax Credit certificate or approval letter to this application. Please use separate applications if Historic Preservation Tax Credits issued on different dates are to be sold.

Definitions:

Seller – Qualified taxpayer to which the Historic Preservation Tax Credits were originally issued or approved, and which may be applying to sell, transfer or assign those credits.

Buyer – Entity that is purchasing the Historic Preservation Tax Credit from the qualified taxpayer of issue, and to which the tax credit is to be sold, transferred or assigned.

Business of Issue – Qualified taxpayer to which the Historic Preservation Tax Credits were originally issued or approved.

DEPARTMENT USE ONLY

DATE RECEIVED:

APPLICATION NUMBER:

I. Prospective SELLER Identification and Information

Please use the name and address that is on record with the PA Department of Revenue unless that on-file information has been changed and is no longer valid.

NAME:

ADDRESS:

TELEPHONE:

FAX:

E-MAIL ADDRESS:

TAXPAYER IDENTIFICATION (SSN, FEIN OR BOX NUMBER OF SELLER):

DATE OF ISSUE OR APPROVAL OF HISTORIC PRESERVATION TAX CREDITS TO BE SOLD:

HAS ANY PORTION OF THE APPROVED HISTORIC PRESERVATION TAX CREDIT BEEN USED AGAINST A TAX LIABILITY OF THE QUALIFIED TAXPAYER, AND IF SO HOW MUCH?

AMOUNT OF UNUSED APPROVED HISTORIC PRESERVATION TAX CREDIT TO BE SOLD FROM THE LISTED ISSUE OR APPROVAL DATE:

SIGNATURE OF PROSPECTIVE SELLER:

PRINTED NAME:

PRINTED TITLE OR AFFILIATION TO THE BUSINESS:

II. Prospective Historic Preservation Tax Credit BUYER Identification and Information

Please use the name and address that is on record with the PA Department of Revenue unless that on-file information has been changed and is no longer valid.

NAME:

ADDRESS:

TELEPHONE:

FAX:

E-MAIL ADDRESS:

TAXPAYER IDENTIFICATION (SSN, FEIN OR BOX NUMBER OF SELLER):

DATE OF ISSUE OR APPROVAL OF HISTORIC PRESERVATION TAX CREDITS TO BE SOLD:

HAS ANY PORTION OF THE APPROVED HISTORIC PRESERVATION TAX CREDIT BEEN USED AGAINST A TAX LIABILITY OF THE QUALIFIED TAXPAYER, AND IF SO HOW MUCH?

AMOUNT OF UNUSED APPROVED HISTORIC PRESERVATION TAX CREDIT TO BE SOLD FROM THE LISTED ISSUE OR APPROVAL DATE:

INDICATE TO WHICH ACCOUNT THE TAX CREDIT SHOULD BE APPLIED (CHECK ONE):

(If more than one amount specify dollar amount to be applied in each case)

CS/FF CNI PI BS IP

SIGNATURE OF PROSPECTIVE BUYER:

PRINTED NAME:

PRINTED TITLE OR AFFILIATION TO THE BUSINESS:

III. Information on the Historic Preservation Tax Credit Sale

DOLLAR AMOUNT AGREED UPON TO COMPLETE THE SALE:

WERE THE SERVICES OF ANY AGENT(S) OR FACILITATOR(S) USED TO ARRANGE THIS PROSPECTIVE HISTORIC PRESERVATION TAX CREDIT SALE?

IF THE SERVICES OF ANY AGENT(S) OR FACILITATOR(S) WERE USED, PLEASE IDENTIFY THE AGENT(S) OR FACILITATOR(S).

WHAT, IF ANY, FEE OR COMMISSION WAS, OR IS BEING, PAID TO EACH AGENT(S) OR FACILITATOR(S) LISTED ABOVE (PLEASE ITEMIZE)?

CS/FF: Capitol Stock and Franchise Tax

CNI: Corporate Net Income Tax

PI: Personal Income Tax

BS: Bank Share Tax

IP: Insurance Premium Tax