



RURAL JOBS INVESTMENT TAX CREDIT INITIAL REPORT

APPENDIX A

Please update the general information by no later than March 1 for the prior calendar year. Add a Portfolio Company (see *Rural Business Information* below) for each Pennsylvania Portfolio Company that you have invested in. *This includes investments that you have exited.*

RURAL GROWTH FUND INFORMATION

1. REPORT DATE:		2. REPORTING PERIOD:	
3. FUND NAME:			
4. REPORTING CONTACT:			
5. CONTACT EMAIL:		6. CONTACT PHONE:	
7. TOTAL INVESTMENT AUTHORITY:		8. TOTAL CAPITAL INVESTED TO DATE:	9. TOTAL CAPITAL INVESTED IN PA COMPANIES:
10. TOTAL PORTFOLIO COMPANIES:	11. ACTIVE COMPANIES*:	12. EXITED COMPANIES**:	*Companies still operating in the Portfolio **Companies sold, shut down, etc.
13. TOTAL PA PORTFOLIO COMPANIES:	14. PA ACTIVE COMPANIES*:	15. PA EXITED COMPANIES**:	
16. ACTIVE PA PORTFOLIO COMPANIES: <i>(Employees at first investment in companies listed under * above)</i>		17. EXITED PA PORTFOLIO COMPANIES: <i>(Employees at first investment in companies listed under ** above)</i>	
18. ACTIVE PA PORTFOLIO COMPANIES: <i>(PA Employees currently at companies listed under * above)</i>		19. EXITED PA PORTFOLIO COMPANIES: <i>(PA Employees currently (or at time of exit/move) at companies listed under ** above)</i>	

RURAL BUSINESS INFORMATION *(Please complete for each PA based portfolio company.)*

1. COMPANY NAME:	2. ADDRESS:
3. WEBSITE:	4. WOMAN OR MINORITY OWNED?
5. CURRENT PORTFOLIO STATUS? IF EXITED, PROVIDE DATE OF EXIT.	
6. NAME OF COMPANY CEO OR BEST CONTACT:	7. TITLE:
8. EMAIL:	9. PHONE:
10. TOTAL INVESTMENT FROM YOUR FUND TO DATE:	11. DATE OF YOUR FIRST INVESTMENT:
12. COMPANY MOVE TO PA FROM YOUR INVESTMENT (Y/N):	
13. OTHER FINANCING RECEIVED AFTER YOUR 1ST INVESTMENT:	
14. OTHER INVESTORS (IF KNOWN):	
15. PENNSYLVANIA EMPLOYEES AT FIRST INVESTMENT:	16. MEDIAN WAGE/SALARY OF PA EMPLOYEES (IF KNOWN):
17. NET INCOME OF RURAL BUSINESS AT FIRST RURAL GROWTH INVESTMENT:	18. RURAL BUSINESS' INDUSTRY SECTOR:

TAX VERIFICATION INFORMATION

1. Provide a copy of the **Rural Business' federal tax return** for the tax year that includes the date of investment by the Rural Growth Fund.
2. Provide a copy of the **Rural Business' Annual Withholding Reconciliation Statement (REV-1667)** for the year that includes the date of investment by the Rural Growth Fund.
3. If applicable, provide a copy of the **Determination Letter** as issued by the Department confirming that the business is considered a Rural Business.
4. **If the Rural Business does not provide the required tax documentation, they must sign and date the confidentiality clause below allowing the Department to verify the information with the Department of Revenue.**

By executing the Rural Jobs and Investment Tax Credit Annual Report, I am authorizing the Pennsylvania Department of Community and Economic Development to request access to and review my company's and its affiliates' state tax returns as it pertains to the rural business's net income and employment information and waives confidentiality under Pennsylvania law and authorize release of this information. Executing the Rural Jobs and Investment Tax Credit Annual Report, authorizes the Pennsylvania Department of Revenue to release the tax returns and tax return information by any means possible, including but not limited to by phone discussions, mail, facsimile, e-mail or other electronic means with the Department of Community and Economic Development.

Signature

Name

Title

Date