



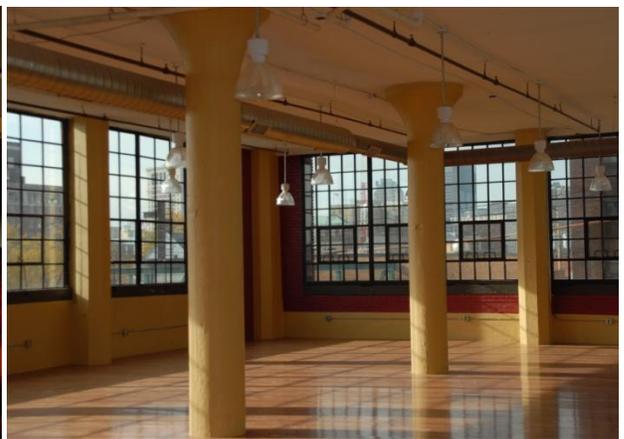
Department of  
Development



OHIO HISTORICAL SOCIETY  
*Ohio Historic Preservation Office*



# Ohio Historic Preservation Tax Credit Program



## Application Amendment Request



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Development



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## General Instructions Guide

- After a project application has been approved, any changes to the project application must be accompanied by written amendment and accepted by the Director of Development to be effective. Project amendments may include, but are not limited to the following:
  - Changes to rehabilitation period start or end dates.
  - Changes to ownership of the historic building.
  - Changes to project contact information.
  - Changes to qualified rehabilitation expenditures (QRE's).
  - Changes to financial information (financing or leveraged investment).
  - Changes to project scope (physical size or end use).
- Amendments for historic building or rehabilitation information amendments should be submitted to the Ohio Historic Preservation Office (OHPO):
  - **State and Federal Combined Applications:** Any amendments for combined applications dealing with historic building or rehabilitation information must be submitted on the appropriate federal form, filed with the OHPO and follow its established schedules and filing procedures.
  - **State Only Applications:** State only applications will be issued a determination based on the OHPO recommendation. The OHPO may require applicants to submit additional documentation, drawings, photographs, maps, or any other necessary information to make a recommendation.
- For definitions on qualified rehabilitation expenditures (QRE's) or other clarifications of this document please refer to the program website (<http://www.development.ohio.gov/UD/OHPTC/>) or contact the Urban Development Division at [historic@development.ohio.gov](mailto:historic@development.ohio.gov) or 614-995-2292.
- Submit one completed original request for amendments to the following:  
**Ohio Department of Development, Urban Development Division,  
77 S. High Street, 26<sup>th</sup> floor, Columbus, Ohio, 43215**
- Factors relating to sufficient evidence of reviewable progress will be used to evaluate requested amendments including but not limited to a viable financial plan, copies of final construction drawings, required historic approvals, and building permits.
- Amendments to approved applications will be communicated in writing to the applicant. Some amendments may involve providing additional required information for an amendment determination.
- Please go through each section to fill in information in the white spaces provided.
- Provide each of the attachments listed in the form below that applies to your application. The request would not be considered complete without the inclusion of these attachments.



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## 1. Project Information

Name of Building				
Address				
City		Ohio	Zip Code	

## 2. Project Contact

Owner Name				
Representative Name				
Address				
City		State		Zip Code
Phone		Email		

I hereby attest that the information I have provided is, to the best of my knowledge, correct. I understand that falsification of representations in the application may subject the applicant to criminal sanctions, including fines and/or imprisonment pursuant to ORC 2921.77, and make the applicant ineligible for future state assistance pursuant to ORC 9.66.

Owner or Authorized Representative's Signature:

Name \_\_\_\_\_ Title \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_



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### 3. Project Amendment Information

Check the box next to the type(s) of amendment requested and provide the necessary information and attachments.

Rehabilitation Period Start and End Dates

Approved Start Date		Proposed Start Date	
Approved End Date		Proposed End Date	

**ATTACHMENT REQUIREMENT**

Attach an updated project timeline describing the proposed schedule for completing the rehabilitation project, including financing, design, construction, and occupancy.

Ownership of the Historic Building

Current Owner Name					
Proposed Owner Name					
Proposed Owner Authorized Representative Name					
Proposed Owner Address					
Proposed Owner City		State		Zip Code	

**ATTACHMENT REQUIREMENT**

- 1) Attach a signed letter from the applicant/seller acknowledging the transfer of the tax credit application to the new owner, and
- 2) Attach at least one of the following documents:
  - a) Deed for the property or county auditor's card for all parcels
  - b) Executed sale and purchase agreement for all parcels
  - c) Executed closing documents (settlement sheets) for all parcels

Project Contact Information

Proposed Contact Name					
Proposed Contact Address					
Proposed Contact City		State		Zip Code	
Proposed Contact Phone		Email			



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Qualified Rehabilitation Expenditures (QRE's)

**Round 1:** Projects approved during Round 1 (prior to June 2008) must file an amendment for increases in QRE's greater than 10% of the original application estimate.

**Round 2 and Later:** Projects approved after Round 1 (after June 2008) may submit amendments to decrease QRE's from original application estimate. Projects may not amend QRE's in an "amount greater than the estimated amount furnished by the applicant on the application," pursuant to ORC 149.311(D)(2).

Approved QRE Estimate	
Proposed QRE Amended Estimate	
<b>ATTACHMENT REQUIREMENT</b> Attach detailed financial information and written explanation justifying the change in project QRE's.	

Financial Information

<b>Leveraged Investment</b> (Total Project Cost / Estimated Tax Credit = Leveraged Investment Ratio)			
Approved Total Project Cost		Proposed Total Project Amended Cost	
Approved Leveraged Investment Ratio		Proposed Leveraged Investment	
<b>ATTACHMENT REQUIREMENT</b> 1) Attach detailed financial information and written explanation justifying the change in total project cost. 2) Attach an updated sources and uses document.			
<b>Financing Secured</b>			
Financing Secured at Application		Financing Secured at Amendment	
Percent of Financing Secured at Application		Percent of Financing Secured at Amendment	
<b>ATTACHMENT REQUIREMENT</b> 1) Attach an updated sources and uses document outlining all committed sources of funds. 2) Include appropriate documentation for committed funding sources. A term sheet, executed loan agreement, or commitment letter should be included for all private financing sources. Developer equity or loans from non-financial institutions should be documented with a signed commitment letter and verification that committed equity is unencumbered and available for the project.			



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Project Scope

<b>Physical Scope</b>									
Rehabilitated Square Feet of Approved Project									
Proposed Rehabilitated Square Feet									
<b>ATTACHMENT REQUIREMENT</b> Attach detailed information explaining what spaces will be added or subtracted to the rehabilitation project. <u>NOTE:</u> All changes in the historic rehabilitation plans for the historic building should be submitted to the Ohio Historic Preservation Office for review and approval.									
<b>End Use</b>									
Approved End Use (Percent %)									
Commercial Office		Retail/Hotel		Institutional		Residential		Parking	
Proposed End Use (Percent %)									
Commercial Office		Retail/Hotel		Institutional		Residential		Parking	
<b>ATTACHMENT REQUIREMENT</b> 1) Attach an updated business plan or description of project indicating the intended use of the space after the rehabilitation is complete and providing justification for the change from the original application.									

Other Application Information

Amendments may request changes to other project information outlined in the application.

Type of Information	
<b>ATTACHMENT REQUIREMENT</b> Attach a narrative that describes and justifies the amendment, including both the original application information and the proposed change.	