

IOWA Department of REVENUE

Historic Preservation Tax Credits Survey
Complete a Separate Form for Each Project
Return to Department of Revenue (See instructions.)

Part 1: Property Information

A: Owner Information

Property Name: _____
STC Project Number: _____
Project Address:
Street Address: _____ City _____ Zip _____
Building Owner: _____
Contact Person: _____ Company: _____
Phone Number: _____ E-Mail Address: _____
Mailing Address:
Street Address: _____ City _____ State ____ Zip _____

B: Building Information

1. Year Building Constructed: _____ 2. Year Building Purchased: _____
3. Building Use Prior to Rehabilitation Project: _____

C: Project Information

1. Project Start Date: _____ 2. Project Completion Date: _____
3. Number of Stories Above Grade: _____
4. Total Building Square Footage Above Grade: _____
5. Building Use After Rehabilitation Project _____
6. Building Usage (or Measures) Before and After Rehabilitation:

	Before	After
Total Residential Space (units)	_____	_____
Low-Income Residential Space (units)	_____	_____
Retail Space (square feet)	_____	_____
Restaurant/ Bar Space (square feet)	_____	_____
Office Space (square feet)	_____	_____
Warehouse Space (square feet)	_____	_____
Manufacturing Space (square feet)	_____	_____
Educational\ Museum\ Library Space (square feet)	_____	_____
Hotel or Other Lodging (guest rooms)	_____	_____
Parking Spaces (number)	_____	_____
Other _____	_____	_____

D: Property Valuation and Taxation

1. Is this building eligible for the State Historic Property Tax Exemption? Yes No
2. Have property taxes been abated for this building? Yes No

Historic Preservation
Tax Credits Survey

3. If property taxes have been abated, please describe the nature of the abatement:

4. Assessed Value of Property in Year Prior to Project Start 4. \$ _____
5. Assessed or Appraised Value After Project Completion 5. \$ _____

Part 2: Project Finance (complete once per project)

A: Project Costs

1. Total Qualified Rehabilitation Cost 1. \$ _____
2. Other Non-Qualified Project Costs 2. \$ _____
- a. Total Project Cost (Line 1 + Line 2) a. \$ _____

B: Project Financing

1. Private External Financing (debt or equity)
- a. Debt 1a. \$ _____
- b. Equity 1b. \$ _____
2. Internal Financing 2. \$ _____
3. State Historic Preservation Tax Credit 3. \$ _____
4. Federal Historic Preservation Investment Tax Credit 4. \$ _____
5. Federal Low Income Housing Tax Credit 5. \$ _____
6. Iowa Enterprise Zone Program Tax Credits 6. \$ _____
7. Local Forgivable Loans 7. \$ _____
8. City Grants 8. \$ _____
9. Low Interest Loans 9. \$ _____
10. Other (specify) _____ 10. \$ _____
11. Other (specify) _____ 11. \$ _____
- a. Total Financing (Add Section B, Lines 1 through 11) a. \$ _____
- Should equal Section A, Line 2a.

C: Rehabilitation Project Resources and Costs

1. Labor Costs: _____ 1a. Number of Workers: _____
2. Materials Costs: _____ Description of "Other" Costs: _____
3. Other Costs: _____
4. Total Costs: _____
- (Add Section C, Lines 1 through 3)
- Should equal Section A, Line 2a.

D: Distribution of Expenditures (percentages)

	Location County	Other Iowa	Outside Iowa
1. Labor	_____	_____	_____
2. Materials	_____	_____	_____
3. Other	_____	_____	_____

For Department of Revenue Use:
Acceptance Date _____