

# State Of Oklahoma REPORTING FORM FOR THE TRANSFER OR ALLOCATION OF A TAX CREDIT



FORM **569**  
Revised 2017

<b>PART 1 – GENERAL INFORMATION</b>		<b>Tax Year:</b> _____	<b>FEIN or SSN:</b> _____
Name of Person/Entity Transferring or Allocating a Credit: _____			
Address: _____			
City, State and ZIP: _____			Phone Number: _____
<b>SELECT ONE:</b> <input type="checkbox"/> Individual <input type="checkbox"/> Partnership <input type="checkbox"/> S-Corporation <input type="checkbox"/> Corporation <input type="checkbox"/> Fiduciary <input type="checkbox"/> Limited Liability Company			
<b>SELECT ONE:</b> <input type="checkbox"/> 1. You are filing this report as the person/entity who originally generated the credit. -or- <input type="checkbox"/> 2. You are filing this report as the person/entity to whom a credit was transferred or allocated and who is transferring or allocating any portion of such credit to another person.  If you selected Number 2, enter the Name and FEIN/SSN of the person who transferred or allocated the credit to you. Name: _____ FEIN/SSN: _____			

<b>PART 2 – CREDIT INFORMATION</b>
1. Name of credit from Page 4 or Page 5: _____
2. Enter the line number of this credit (from Page 4 or Page 5): _____
3. Amount of credit: \$ _____

<b>PART 3 – COMPLETE IF ANY PORTION OF THE CREDIT WAS TRANSFERRED</b>			
Enter the Transferee Name	FEIN/SSN	Transfer Date	\$ Amount of Credit Transferred
1)			
2)			
3)			
4)			
5)			
6)			
7)			
8)			
9) Total from Supplemental Schedule			
10) <b>Total amount of credit</b> that was transferred (add Part 3 lines 1 - 9)			

(For allocated credits, complete Part 4 on page 2)

Under penalties of perjury, I declare I have examined this return, and to the best of my knowledge and belief it is true, correct and complete.

Signature _____ Date _____	Signature of Preparer _____ Date _____
Phone Number _____	Preparer Phone Number _____

**REPORTING FORM FOR THE TRANSFER OR ALLOCATION OF A TAX CREDIT (TITLE 68 OS SECTION 2357.1A-2)**

<b>PART 4 – COMPLETE IF ANY PORTION OF THE CREDIT WAS ALLOCATED</b>			
<b>Name of Shareholder, Partner or Member</b>	<b>FEIN/SSN</b>	<b>\$ Amount of Credit Allocated</b>	<b>“X” if a PTE</b>
1)			
2)			
3)			
4)			
5)			
6)			
7)			
8)			
9)			
10)			
11)			
12)			
13)			
14)			
15)			
16)			
17)			
18)			
19)			
20)			
21)			
22)			
23)			
24)			
25)			
26)			
27)			
28)			
29)			
30)			
31)			
32)			
33) Total from Supplemental Schedule			
34) <b>Total amount of credit</b> that was allocated (add Part 4 lines 1 - 33)			

**REPORTING FORM FOR THE TRANSFER OR ALLOCATION OF A TAX CREDIT**  
TITLE 68 OS SECTION 2357.1A-2 AND RULE 710:50-3-55

**REPORTING REQUIREMENTS**

Complete Form 569 to report any tax credit, authorized to be claimed under Title 68 of the Oklahoma Statutes, that has been transferred or allocated on or after July 1, 2011. The form shall be filed with the Tax Commission on or before the 20th day of the second month after the tax year in which an act occurs that allows the tax credit to eventually be claimed.

If a taxpayer claims a credit on any state tax return that was not previously reported on this form, such credit will be disallowed. Upon the filing of the required Form(s) 569, the credit will be allowed.

**AMENDED REPORT**

If you are amending Form 569, place an 'X' in the Amended Report box. The amended report will supersede the original report in its entirety. Please fill out the form completely, do not provide just supplemental information.

**PART 1 – GENERAL INFORMATION**

**Tax Year:**

- Enter the tax year in which the credit was generated if you are the person who originally generated the credit.
- Enter the tax year the credit was transferred or allocated to you if you transferred or allocated any portion of a credit previously transferred or allocated to you.

**PART 2 – CREDIT INFORMATION (WHEN COMPLETING PART 2, REFER TO CREDITS THAT ARE ALLOCABLE OR TRANSFERABLE LISTED ON PAGES 4 AND 5)**

1. Enter the name of the credit as shown on Page 4 or Page 5.
2. Enter the line number from Page 4 or Page 5 that corresponds to this credit.
3. Enter the amount of the credit that has been allocated and/or transferred to another person. This amount should equal the total reported in Parts 3 and 4.

**PART 3 – TO BE COMPLETED BY A TRANSFEROR WHO HAS TRANSFERRED A CREDIT**

List the name, federal identification number, date of transfer and amount of credit that was transferred to each transferee. If additional rows are needed, attach a Supplemental Schedule using the same format as Part 3 and carry the total from the schedule to line 9.

**PART 4 – TO BE COMPLETED BY A PASS-THROUGH ENTITY THAT HAS ALLOCATED A CREDIT**

List the name, federal identification number and amount of credit that was allocated to each shareholder, partner or member. Place an 'X' in the column if the shareholder, partner or member is itself a pass-through entity (PTE). If additional rows are needed, attach a Supplemental Schedule using the same format as Part 4 and carry the total from the schedule to line 33.

**This form may be filed electronically.** To access this form visit [www.tax.ok.gov](http://www.tax.ok.gov) and click on "Forms and Publications". From there, click on "Forms" and then "Income".

If not filing electronically - Mail this form, including any Supplemental Schedules, to:

Oklahoma Tax Commission  
Post Office Box 26800  
Oklahoma City, OK 73126-0800

**REPORTING FORM FOR THE TRANSFER OR ALLOCATION OF A TAX CREDIT**  
TITLE 68 OS SECTION 2357.1A-2 AND RULE 710:50-3-55

	<b>Name of Credits that are Allocable or Transferable</b>	<b>Allocable / Transferable</b>	
1	Oklahoma Investment/New Jobs Credit	Allocable	
2	Coal Credit (Credits earned prior to January 1, 2014 must be transferred by December 31, 2013. Credits earned on or after January 1, 2014 may not be transferred.)	Allocable	Transferable
3	Credit for Investment in a Clean-Burning Motor Vehicle Fuel Property	Allocable	
4	Small Business Capital Credit (For tax years beginning before January 1, 2012.)	Allocable	
5	Small Business Guaranty Fee Credit (Effective January 1, 2014 the credit was repealed)	Allocable	
6	Credit for Food Service Establishments that Pay for Hepatitis A Vaccination for their Employees (Effective January 1, 2014 the credit was repealed)	Allocable	
7	Credit for Energy Assistance Fund Contribution (Effective January 1, 2014 the credit was repealed)	Allocable	
8	Credit for Venture Capital Investment (Transferable for 3 years.)	Allocable	Transferable
9	Credit for Hazardous Waste Control (Effective January 1, 2014 the credit was repealed)	Allocable	
10	Credit for Employers Providing Child Care Programs (Effective January 1, 2014 the credit was repealed)	Allocable	
11	Credit for Entities in the Business of Providing Child Care Services (For tax years ending before January 1, 2016)	Allocable	
12	Credit for Commercial Space Industries (Effective January 1, 2014 the credit was repealed)	Allocable	
13	Credit for Tourism Development or Qualified Media Production Facility (Effective January 1, 2014 the credit was repealed)	Allocable	
14	Oklahoma Local Development and Enterprise Zone Incentive Leverage Act (Effective January 1, 2014 the credit was repealed)	Allocable	
15	Credit for Qualified Rehabilitation Expenditures	Allocable	Transferable
16	Credit for Space Transportation Vehicle Provider (For tax years ending before 1/1/09. Transferable for 3 years.)		Transferable
17	Rural Small Business Capital Credit (For tax years beginning before January 1, 2012.)	Allocable	
18	Credit for Electricity Generated by Zero-Emission Facilities (Credits earned on or after January 1, 2014 may not be transferred)(With respect to electricity generated by wind, the facility must be placed in operation no later than July 1, 2017)	Allocable	Transferable
19	Credit for Financial Institutions Making Loans under the Rural Economic Development Loan Act (For tax years beginning before January 1, 2017)	Allocable	

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	<b>Name of Credits that are Allocable or Transferable</b>	<b>Allocable / Transferable</b>	
20	Credit for Manufacturers of Small Wind Turbines (For tax years ending on or before December 31, 2012)	Allocable	Transferable
21	Credit for Qualified Ethanol Facilities (Effective January 1, 2014 the credit was repealed)	Allocable	
22	Poultry Litter Credit (For tax years ending on or before December 31, 2013)	Allocable	
23	Credit for Qualified Biodiesel Facilities (Effective January 1, 2014 the credit was repealed)	Allocable	
24	Film or Music Project Credit (For tax years ending before January 1, 2015)	Allocable	
25	Credit for Breeders of Specially Trained Canines (Effective November 1, 2013 the credit was repealed)	Allocable	
26	Credit for Wages Paid to an Injured Employee (For tax years ending before January 1, 2015)	Allocable	
27	Credit for Modification Expenses Paid for an Injured Employee (For tax years ending before January 1, 2017)	Allocable	
28	Dry Fire Hydrant Credit (Effective January 1, 2014 the credit was repealed)	Allocable	
29	Credit for the Construction of Energy Efficient Homes (For expenses incurred before July 1, 2016)	Allocable	Transferable
30	Credit for Railroad Modernization	Allocable	Transferable
31	Research and Development New Jobs Credit (Effective January 1, 2014 the credit was repealed)	Allocable	
32	Credit for Stafford Loan Origination Fee (Effective January 1, 2014 the credit was repealed)	Allocable	
33	Gas Used in Manufacturing Credit (Effective January 1, 2014 the credit was repealed)	Allocable	
34	Credit for Biomedical Research Contribution	Allocable	
35	Credit for Employers in the Aerospace Sector	Allocable	
36	Wire Transfer Fee Credit (For tax years ending before January 1, 2017)	Allocable	
37	Credit for Manufacturers of Electric Vehicles (Effective January 1, 2014 the credit was repealed)	Allocable	
38	Credit for Cancer Research Contribution	Allocable	
39	Oklahoma Capital Investment Board Tax Credit	Allocable	Transferable
40	Credit for Contributions to a Scholarship-Granting Organization	Allocable	
41	Credit for Contributions to an Educational Improvement Grant Organization	Allocable	
42	Oklahoma Affordable Housing Tax Credit	Allocable	