

Utah Renewable Energy Systems Tax Credit Commercial and Residential Investment Tax Credit Application: Geothermal Heat Pump (GHP)

This form must be completed by all applicants seeking Utah renewable energy investment tax credits. The Office of Energy Development (OED) may, at its discretion, conduct an on-site inspection of a system applying for a commercial or residential tax credit. Applications for systems that are found to not be in compliance with State rule or vary from information provided in this application may be denied or the amount of the tax credit may be altered. See Utah State Rule R362-2 (<http://www.rules.utah.gov/publicat/code/r362/r362-002.htm#T10>) to follow as you fill out this application form.

*****PLEASE READ BEFORE SUBMITTING*****

You may only submit your application in its entirety online or via mail. You can NOT submit your application in separate parts. For example, if you are submitting online, you will upload all scanned documents and submit your entire application online (online application can be found here: <http://energyutah.force.com/portal>). ALTERNATELY, if you are submitting via mail, you will include this paper application and all supporting documentation in one mailed package. OED has the right to reject any applications submitted in parts and request the applicant re-submit their materials. *If you have any questions on this, please call OED before submitting your application. Richard Bell: 801-538-8662. OED mailing address: State of Utah, Office of Energy Development, PO Box 144845, Salt Lake City, UT 84114-4845*

Applicant Information

First Name:

Last Name:

Mailing Address (system address will be filled in later, this is your mailing address):

City:

State:

Postal Code:

Daytime Phone:

E-mail address:

Additional Taxpayer Name (if filing jointly):

Applicant Information Continued:

If Taxpayer is a business, please fill in the following information:

Business Name:

Tax ID Number:

Business Contact Name:

Business Contact Phone Number:

The taxpayer will claim this tax credit against:

Individual Income Tax

Corporate Franchise or Income Tax

Does the taxpayer own or lease the system?

Own

Lease

If the system is leased, please provide owner information below (otherwise leave blank):

Name:

Phone:

Address:

City:

State:

Postal Code:

System Information

Date on which installation of the system was completed:

Has a Utah renewable energy tax credit been previously claimed for this building or property?

Yes

No

Don't Know

Is the system new, or an upgrade to an existing system?

New

Upgrade

If yes, year credit was received:

If yes, amount of credit received:

System Information Continued:

System Street Address (if different from Mailing Address):

City:

State:

Postal Code:

If system location does not have a street address, please provide alternative location information. Location information must be sufficient to allow OED staff to be able to locate the system for on-site verification of the information described in the application.

Township:

Plat number/description:

GPS North (Degree, Minute, Second):

GPS West (Degree, Minute, Second):

If system is located at a home, is it a:

House

Apartment

Condominium

Other (specify _____)

If system is located at a business, is it a :

Office

Store

Factory

Other (specify _____)

The home is a:

Primary Residence

Secondary Residence

Which of the following applies to your GHP system:

Water source/open loop

Water source/closed loop

Ground source/vertical

Ground source/horizontal

If water source, does the system use:

Surface water

Ground water

System Information Continued:

List make and model of heat pumps:

Heat Pump 1 Make:

Heat Pump 1 Model:

Heat Pump 1 Capacity Heating
(tons or Btu/hr)

Heat Pump 1 Capacity Cooling
(tons or Btu/hr)

Heat Pump 2 Make:

Heat Pump2 Model:

Heat Pump 2 Capacity Heating
(tons or Btu/hr)

Heat Pump 2 Capacity Cooling
(tons or Btu/hr)

(If additional heat pumps were used, please attach additional sheet with this form)

Total Capacity of the completed system (tons):

System Cost

For the following section, the fields regarding eligible cost and financial assistance are required. If you so choose to fill in the optional field for tax credit amount, please refer to Utah State Rule R362-2 (<http://www.rules.utah.gov/publicat/code/r362/r362-002.htm#T10>) to follow as you fill out this section. ***System cost values are for 2014 and later. For geothermal systems installed previous to 2014, please contact OED for help in calculating your tax credit amount.

Total eligible cost of system:

(May include: exterior piping, drilling and excavation, labor, design, heat pump, interior piping (geothermal fluid piping and hydronic piping), heat exchanger, buffer tank, pumps, valves. The heat pump model number must be listed on the Air Conditioning Heating and Refrigeration Institute (AHRI) Certified Product Directory: www.ahridirectory.org)

Did you receive a rebate, grant, or other financial assistance on your system?

Yes No

System Cost Continued:

If you received financial assistance on your system, list all sources and amounts below:

Source: Amount:

Source: Amount:

Enter amount of tax credit that you wish to claim:

(See <http://www.rules.utah.gov/publicat/code/r362/r362-002.htm#T10> for instructions)

Calculation for residential tax credit granted = ((Eligible System Cost OR \$6,500 x rated output capacity in tons, whichever is less) - Rebates) x 0.25. Or \$2,000, whichever is less.

Calculation for commercial tax credit granted = ((Eligible System Cost OR \$5,500 x rated output capacity in tons, whichever is less) - Rebates) x 0.10. Or \$50,000, whichever is less.

Project Installer Information

Installer Name: Phone:

Street Address:

City: Postal Code:

Contractor License Number State: License Type:

Was the system self-installed by the applicant? (If yes, you must have the system inspected by a certified professional and upload a receipt of the inspection under the "Documentation" section of this application.)

Yes

No

Project Designer Information

(Optional. Required if different than installer):

Designer Name:

Phone:

Designer Street Address:

Designer City:

State:

Postal Code:

Contractor License Number

License Type:

Designer is (check all that apply):

A Utah Professional Engineer

A certified GeoExchange designer

A Certified Energy Manager

An IGSHPA accredited installer

Vertical Bore Well Driller Information

(Optional. Required if a Ground Source/Vertical system)

Driller Name:

Phone:

Driller Street Address:

City:

State:

Postal Code:

Contractor License Number

License Type:

For vertical bore wells, was a provisional well approval obtained from the Utah Division of Water Rights?

Yes

No

N/A

System Documentation:

The following three types of documentation must be attached in your GHP application package:

Check the boxes below to verify that you have included each item:

- 1) Detailed diagrams of the system as installed showing system components, how the system operates, and which components are eligible costs for computing the tax credit.
 - 2) Photographs or copies of photographs that show major system components, electrical interconnections with the electrical system, and any other components of the system that are eligible for the tax credit.
 - 3) Clear documentation of costs incurred for all components of the renewable energy system. The most applicable document is a copy of the final paid invoice.
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Signature of Filer

*I certify that the information provided in this application and the attached documentation is correct and true to the best of my knowledge. ***Note: If you are a contractor filling out an application for your client, the client must sign their form.*

Signature of Filer:

Date:

Signature of Joint Filer, if applicable

Date:

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