



Application for Oregon Strategic Investment Program (SIP)

ORS 285C.600 to 285C.626 and 307.123

Complete & Submit to Business Oregon, Business Tax Incentives
775 Summer Street NE, Suite 200, Salem OR 97301-1280
503-986-0140, Fax: 503-581-5115, TTY 1-800-735-2900, www.oregon4biz.com

Please type (or fill out electronic version available from department) and include the following with submission:

- Non-refundable **application fee** (see below)
- **Two copies** of application (one with original signature) and all attachments, as well as each *critical item* (see below).

Department Use Only:
 Submission Date: _____ | County Commission Approval: _____ | Urban | Rural

Project Location

Project/property name _____

Address/location _____

City _____	County in which located _____
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Check if an **urban** project—inside urban growth boundary (UGB) on Dec. 1, 2002, of a region/city with current population ≥ 30,000

Check if located within an incorporated city's limits

Check if located in an Indian reservation*—Tribe(s): _____

*In this case, the tribal government takes the place of county for purposes of local approval

Business Applicant

Contact name _____	Title _____		
Name of business _____			
Mailing address _____			
City _____	State _____	Zip _____	Fax _____
Telephone _____	Email _____		
Headquarters' Location _____	Other Major Locations _____		
Federal Taxpayer ID Number _____	Form of Organization (e.g., 'C' corporation) _____	U.S. State of Incorporation _____	
Five-digit North American Industry Classification System (NAICS) code _____	Securities Exchange, if applicable** _____	Company Symbol, if applicable** _____	

**If not listed on securities exchange, attach names & titles of all company officers and persons owning at least 10% of outstanding equity

Application & Approval Fees

Check here that included with this application is a check or money order, payable to—"State of Oregon, Oregon Business Development Department"—in the amount of: \$5,000, or \$10,000 for *urban* project

Check here that you commit to pay an additional fee of \$10,000, or \$50,000 for an *urban* project, as required, in order to be officially authorized to receive the exemption, if the proposed project is approved
(Half of this fee amount is forwarded to the Oregon Department of Revenue for its administrative work)

Checklist of Critical Items

Check below that each is included with this application: ***

<input type="checkbox"/> Evidence that county's governing body held public hearing on matter before executing local agreement	<input type="checkbox"/> First-source hiring agreement executed with contact agency for local publicly funded job training providers, for the term of the exemption, consistent with Oregon Administrative Rules Division 70
<input type="checkbox"/> Agreement in accordance with ORS 285C.609(4) by the applicant/business firm with the county—and the city if project is in incorporated territory	<input type="checkbox"/> Map of site where proposed project will be located
<input type="checkbox"/> Any document or material (e.g., studies, estimates, &c.) provided to local governments in this matter, whether or not requested or related to agreement	<input type="checkbox"/> Most recent annual financial statement and most recent interim statement (audited)
<input type="checkbox"/> Official action of approval adopted by a majority of the county's governing body, pursuant to agreement	<input type="checkbox"/> Brief narrative history of the business and description of business activities in which it engages

***If confidentiality is requested please indicate clearly for specific item (department cannot necessarily guarantee confidentiality under all conditions)

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Project Information

Anticipated Month/year for Project Commencement	Enter estimated investment cost as follows:		
Anticipated Month/year for Project Completion	- Land (purchase & site improvement)		
Attach description for both of the following: 1) The proposed project, in terms of overall phases, acres of land, facilities, buildings & structures to be constructed, rebuilt or modified, the types and quantities of equipment & machinery to be installed or upgraded, etc., as effectively as possible 2) The operations comprising the proposed project, including goods/services to be produced, primary (export) markets, and the relationship to selling "goods or services into markets for which national or international competition exists"	- New Buildings/Structures		
	- Machinery/equipment not readily moved due to weight or being affixed/attached to real property		
	- Structural Fixtures		
	- Additions, modifications, remodeling, renovation, recondition, refurbishments, retrofits and upgrades		
	- Readily movable machinery & equipment and other personal property		
	Total		\$ 0

Check here that all newly invested, eligible project property will satisfy the following three criteria:

- Newly acquired by the applicant/business firm, and
- Not previously exempt under Strategic Investment Program, and
- Has not and will not be subject to any Oregon enterprise zone exemption.

Check below that the applicant makes the following commitments with respect to the eligible project:

To provide timely notification or evidence to the county assessor or the Department of Revenue, as requested or otherwise necessary, including but not limited to the date when taxable property is placed in service

To ensure, for any leased property, that the ultimate lessee of the property is responsible for the payment of taxes, as assessed and levied on the property in accordance with the Strategic Investment Program

Employment and Economic Impacts

Current number of business firm's employees:	Expected at site, after project is placed in service:		
- At proposed project site	Number of...	Within Three Years	Over Life of Project
- In Oregon	Additional Hires		
- In the United States	Jobs Retained		
- Worldwide	Increase in total annual payroll directly resulting from project within three years		

Attach descriptions for all of the following:

- 3) Breakdown by major labor category (e.g., technicians, clerks, assemblers, engineers), with number of employees to be hired, transferred or retained within three years, and average annual pay by category
- 4) If the project is an in-state relocation ... reasons for relocating and the effect on existing workforce
- 5) The project's probable effects on local public services (roads, utilities, schools, etc.) and any special demands or needs for extraordinary expenditures
- 6) Project's likely economic effects in terms of suppliers/spin-off investments, indirect jobs, diversification, the local tax base, and future local and state tax revenues to be collected from the business.

Declaration By Applicant/Business Representation

I swear to have examined this form and all accompanying materials. All information provided in connection with this application for the Oregon Strategic Investment Program is, to the best of my knowledge, true, accurate, complete and current. I further certify that, except as may be described in this application, no litigation is currently pending or threatened in any court or other tribunal or competent jurisdiction, state or federal, in any way contesting, questioning or affecting the eligibility of the applicant to utilize this program, the ability of the applicant to complete the project, or the validity or enforceability of any covenant or document executed by the applicant in connection with the application. The company also agrees, now and in the future, to provide employment information requested by the department and to permit the department access to all Oregon State Employment Department employment and wage data about business firm. I therefore request approval by authority of the Oregon Business Development Commission under ORS 285C.606, so that property comprising the proposed project may be assessed and partially exempt from taxation as provided under ORS 307.123. I understand that receipt of the 15-year exemption depends on satisfaction by the actual project of applicable requirements, and I agree that any material misrepresentation of fact is grounds for the state of Oregon to deny or withdraw the benefit of the program at any time.

Signature X	Date
Printed Name	Title of Authorized Company Representative