Create a portal login if you don’t have one.

You may not complete investor applications with the same login used for the business certification application. Applicants associated with a business need to consider that investors and their affiliates may only hold 30% of the voting power in the business prior to the qualified investment, and 50% following.

Your starting point for the Investor Pre-Qualification Application is the OEDIT Application Portal.

On the OEDIT Application Portal Login Page, enter your username (typically your email address) and your password.

Review the tips for working in the application portal.

If you don’t remember your password, click on the text “Forgot Your Password?” to be emailed a temporary password. If you do not immediately see the email, check your spam folder.
OEDIT Application portal landing page.

Scroll down the list of tiles to find the “Advanced Industries Programs” tile, and click on it.
Find the application type of interest. As an investor in a qualified business, you’ll select the “AI Tax Credit Investor Pre-Qualification...” application. Click Apply in the Action field to begin the application.
This application has 3 tabs. Use the “Next” button to move to the next tab. You may also click “Save & Exit” to leave the application and return to it later. If you move between tabs without using the button, data entered on a page will not be saved.
Tab 2 has 8 questions that must be answered.

1. **Question 1**: Have you already made your investment, and did this investment take place on or after January 1 of the current program year?
   - Yes
   - No

2. **Question 2**: Was the investment at least $10,000?
   - Yes
   - No

3. **Question 3**: Did you invest in stock or convertible debt?
   - Yes
   - No

4. **Question 4**: Did you hold less than 30% of the voting power before making the investment, and will you hold less than 50% of the voting power after making the investment?
   - Yes
   - No

5. **Question 5**: Was this tax credit a significant factor in your decision to make this investment, such that without this credit, you would not have made this investment or made the investment at a substantially lower level?
   - Yes
   - No

6. **Question 6**: Date of Investment
   - mm/dd/yyyy

7. **Question 7**: Investor’s Form of Business Organization:
   - Individual/ Sole Proprietorship
   - Limited Liability Company (LLC)
   - Partnership/LLP
   - C Corporation
   - S Corporation
   - Trust (Business)
   - Trust (Personal)

8. **Question 8**: Have you received an advanced industries investment tax credit for an investment in this company in the past or current year?
   - Yes
   - No
QUESTION 1
Have you already made your investment, and did this investment take place on or after January 1 of the current program year?

You must have already made the investment, to be eligible.

QUESTION 2
Have you already made your investment, and did this investment take place on or after January 1 of the current program year?

QUESTION 3
Did you invest in stock or convertible debt?

Your investment must be one of these to be eligible.

QUESTION 4
Did you (and all affiliates) hold less than 30% of the voting power before making the investment, and will you hold less than 50% of the voting power after making the investment?

The investor and affiliates must comply with this requirement. “Affiliate” means any person or entity that controls, is controlled by or is under common control with another person or entity. In the case of individuals, an affiliate as a spouse, child, or parent.

QUESTION 5
Was this tax credit a significant factor in your decision to make this investment, such that without this credit, you would not have made this investment or made the investment at a substantially lower level?

QUESTION 6
Date of Investment
Application must be made within 90 days of the investment

QUESTION 7
Select the type of entity that represents you as the investor.

- Individual/Sole Proprietorship
- Limited Liability Company (LLC)
- Partnership/LLP
- C Corporation
- S Corporation
- Trust (Business)
- Trust (Personal)

Your response should relate to you the investor. C Corp investments are not eligible.
**QUESTION 8**
Have you received an advanced industries investment tax credit for an investment in this company in the past or current year?

- [ ] Yes
- [x] No

*An investor may only apply once for an AITC tax credit for investing in a business. An investor may invest in different businesses and earn the AITC tax credit on multiple investments in that way.*

Make sure to click one of the buttons so that the information is saved. If you click to another tab or out of the system without clicking one of these buttons, the data that you’ve entered to will be lost.

If your responses do not meet the qualification criteria, you will receive notice that your application was denied. If for some reason, you feel your initial responses were incorrect, you can create a new pre-qualification application.