

Advanced Industry Tax Credit - Guide for Investor Pre-Qualification Application

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.

https://oedit.secure.force.com/oedit/

LOGIN

Welcome to the Colorado Office of Economic Development and International Trade (OEDIT) online application system.
Log in to view saved applications, check application status, or apply for funding opportunities.

Username

Password

Login

[Forgot Your Password?](#) | [New User?](#)

TIPS FOR THE ONLINE APPLICATION SYSTEM

1. Your Username is your Email.
2. Each user needs their own login and password.
3. If you are a new user, the system administrator will need to approve your request. This may take up to 48hrs. Please check back into the portal to confirm activation as you will not receive an email.
4. Use one of the preferred browsers; Google Chrome, Mozilla Firefox or Safari. Internet Explorer and Edge are NOT supported.
5. To reset your password click on Forgot Your Password? hyperlink located below the Username and Password fields. Type in your username which in most cases will be your email. The system will email you a temporary password. When you log into the portal with your username and temporary password you will be prompted to create a new password.
6. If you are getting a "blank screen" or "error message" you need to clean out your Temporary Internet Files and Cache.

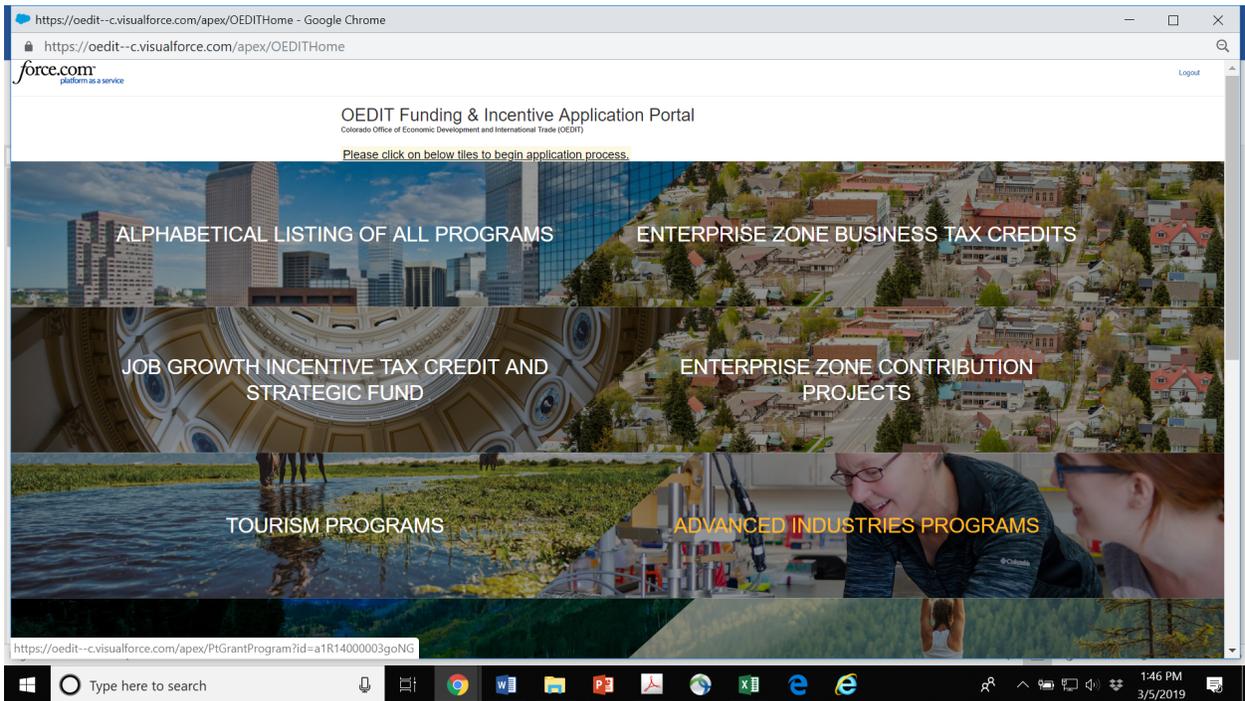
For further assistance registering or logging into the system, please contact Leasa Schwaebe at leasa.schwaebe@state.co.us.

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OEDIT Application portal landing page.

Scroll down the list of tiles to find the “Advanced Industries Programs” tile, and click on it.



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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.

Advanced Industries Programs Advanced Industries

Advanced Industries Accelerator programs which are designed to promote growth and sustainability in these industries by helping accelerate commercialization, encourage public-private partnerships, increase access to early stage capital and create a strong ecosystem that increases the state's global competitiveness. Advanced Industries Tax Credits program which provides assistance to Colorado companies operating in seven advanced industries the opportunity to receive capital from investors

Apply For Funding Opportunities

Click either the detail hyperlink or the action button to begin the application process.

Details	Category	Division	Frequency	Close Date/Time	Action
AI Tax Credit Investee Pre-Certification 2018-2022	Incentives	Business Funding & Incentives	First-Come/First Served		Apply
FY19 Global Consultant Network	Financing	International Trade	First-Come/First Served	5/1/2019 12:00 PM	Apply
AI Collaborative Infrastructure FY19-2 Full Application	Incentives	Business Funding & Incentives	Semi-annual	4/1/2019 5:00 PM	Apply
AI Tax Credit Investor Pre-Qualification 2018-2022	Incentives	Business Funding & Incentives	First-Come/First Served		Apply

Edit/View My Applications

Action Icon Index for the table below:

[Edit](#) [Print](#) [Report](#) [Delete](#) [Reimburse](#)

No recent records found.

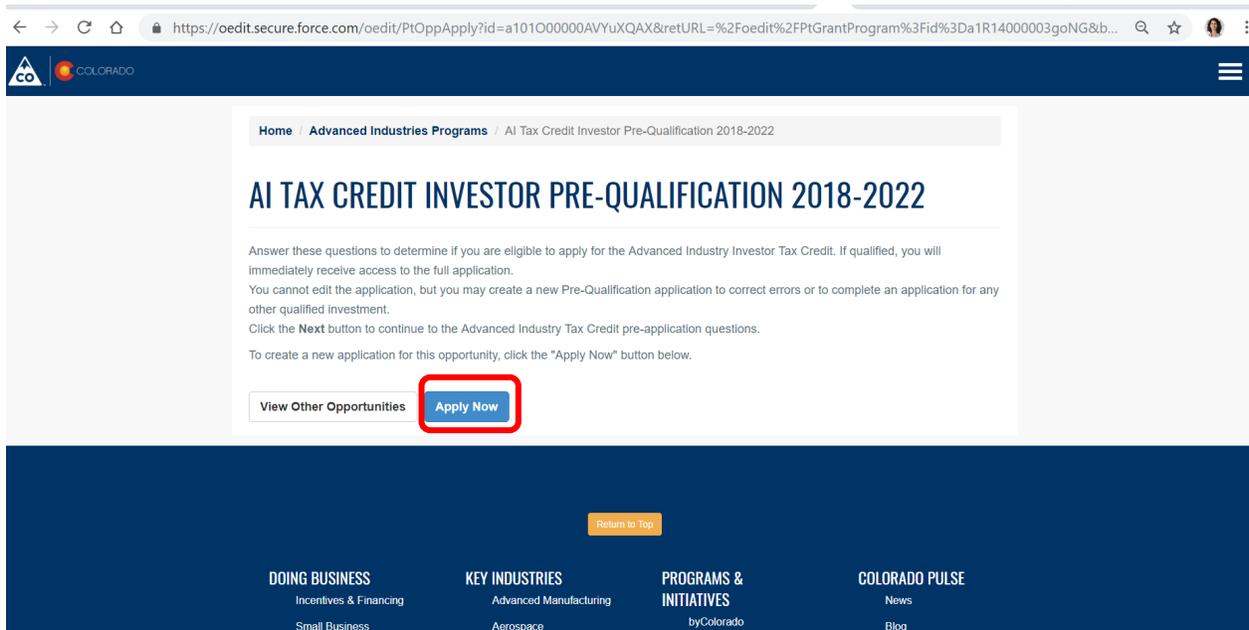
Edit/View My Reports

Action Icon Index for the table below:

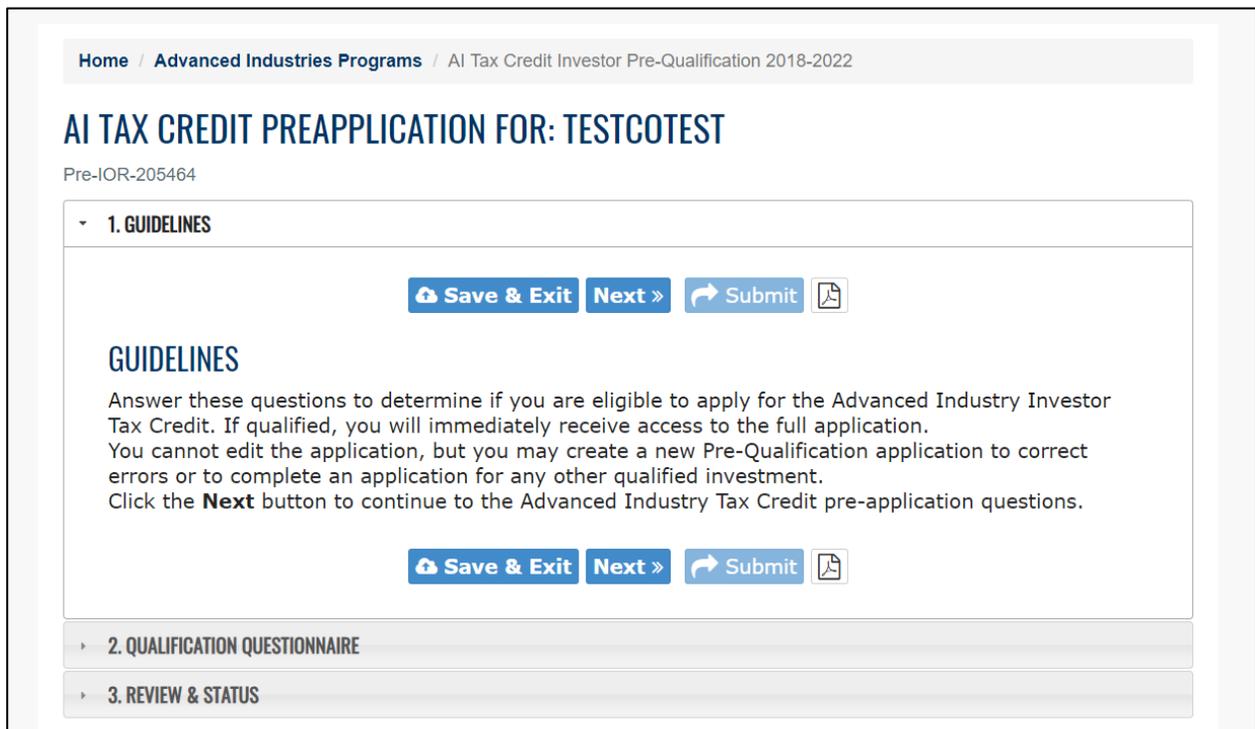
[Edit](#) [Print](#) [Delete](#)

No recent records found.

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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.



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Tab 2 has 8 questions that must be answered.

2. QUALIFICATION QUESTIONNAIRE

Required Information

Save & Exit Save < Previous Next > Submit

QUALIFICATION QUESTIONNAIRE

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

QUESTION 2
Was the investment at least \$10,000?

- Yes
- No

QUESTION 3
Did you invest in stock or convertible debt?

- Yes
- No

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

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

QUESTION 6
Date of Investment

mm/dd/yyyy

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)

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

Required Information

Save & Exit Save < Previous Next > Submit

3. REVIEW & STATUS

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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.

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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

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.

 = Required Information

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.