

COMMONWEALTH OF KENTUCKY
Kentucky Heritage Council
 Kentucky Historic Preservation Tax Credit Certification Application
 Summary of Investment and Election of Credit

Questions? Contact Us:
<https://bit.ly/KyTaxCredit>
 KHC.taxcredits@ky.gov
 502-892-3620

This form must be completed and submitted as an attachment to the Part 3 – Request for Certification of Completed Work

Historic Property Name (if unknown, leave blank):

Street:

City:

County:

State: **KY** Zip:

Owner:

Date:

Organ:

Street:

Phone:

The period that QREs are being captured runs from (start date)

(Please note that for the Kentucky Historic Preservation Tax Credit, these dates cannot exceed a 24-month period.)

For commercial projects, adjusted basis at start date is \$ N/A and on completion date is \$ N/A

If applicable, denote tax year in which owner previously claimed a KY Historic Preservation Tax Credit on this property: 2018

I have chosen to:

☒ Use the credit. If this credit was allocated in the 2011 allocation pool or later, the credit shall be refundable.

☐ Transfer or assign the credit for some or no consideration, along with any related benefits, rights, responsibilities and liabilities to any entity subject to the tax imposed by KRS 136.505. I understand that within thirty (30) days of the date of any transfer of credits, the party transferring the credits shall notify the Kentucky Department of Revenue of:

- The name, address, employer identification number, and bank routing and transfer number, of the party to which the credits are transferred;
- The amount of credit transferred; and
- Any additional information the Department of Revenue deems necessary.

An application for a final determination of credit shall include an IRREVOCABLE election by the taxpayer to use or transfer the credit.

QRE*	Materials	Labor
No. 1 - HVACs 1st Flo	\$14,250.00	\$14,250.00
No. 1 - Skylights 1st F	\$3,035.97	\$0
No. 1 - HVAC removal	\$0	\$37,859.00
No. 1 - Roof Replacem	\$46,204.40	\$69,306.60
No. 2 & 4 - Balustrades	\$250.00	\$11,200.00
No. 2 - Roof Replacem	\$32,569.43	\$16,755.75
No. 3 - Balustrades 5th	\$250.00	\$5,650.00
No. 3 & 6 - HVACs 5th	\$43,120.53	\$21,237.00
No. 3 - Shingle Roof R	\$128.97	\$1,700.00
No. 3 - Roof Replacem	\$132,251.6	\$68,038.50
No. 4 - Roof Replacem	\$32,569.43	\$16,755.75
No. 4 - Deck Repair/Re	\$8,980.00	\$28,175.00
No. 5 - 4th Floor North	-0- N/A	-0- N/A
No. 6 - 1st Floor West	-0- N/A	-0- N/A
Total QRE*	\$313,610.37	\$290,927.60

*Qualified Rehabilitation Expenditures

I attest that I am the owner of the property, or am a representative authorized to sign on the behalf of the owner. I attest that the information I have provided is, to the best of my knowledge, correct, and that I have documentation to support this report pursuant to an audit.

SIGNATURE

Notary or CPA Signature

Date

Note: For owner-occupied residences, this form must be notarized. For all other projects, a Certified Public Accountant (CPA) must complete a compilation of qualified rehabilitation expenses or sign this form. The compilation must include the CPA name, license #, contact information and signature, as well as dates and amounts for QREs, amount of adjusted basis, and dates and amounts showing adjusted basis is exceeded. **Contact us with any questions:** <https://bit.ly/KyTaxCredit>, KHC.taxcredits@ky.gov, or 502-892-3620.

**Summary of Investment and Election of Credit
Receipts of Qualified Rehabilitation Expenditures (QRE) Listed on KHC Form TC-4**

[REDACTED], [REDACTED], [REDACTED]

QRE	Vendor(s)	Materials	Labor	Total
No. 1 – New HVACs 1 st floor roof East	JonLe	\$14,250.00	\$14,250.00	\$28,500.00
No. 1 - Skylights 1 st floor roof East	Mueller - Velux	\$3,035.97	\$0	\$3,035.97
No. 1 – HVAC gas capture remove/replace - 1 st floor roof East	Ivey Mechanical ``	\$0	\$37,859.00	\$37,859.00
No. 1 - Roof Replacement 1 st floor East	Holland Roofing	\$46,204.40	\$69,306.60	\$115,511.00
No. 2 & 4 - Balustrades 4 th floor roof East & West Elevations	EYM Masonry – Fitzpatrick	\$250.00	\$11,200.00	\$11,450.00
No. 2 - Roof Replacement 4 th floor East	Prestige	\$32,569.43	\$16,755.75	\$49,325.18
No. 3 - Balustrades 5 th floor roof central elevation octagon	EYM Masonry – Fitzpatrick	\$250.00	\$5,650.00	\$5,900.00
No. 3 & 6 – New HVACs 5 th floor roof East & West - Center Elevation & 1 st floor roof West elevation	JonLe	\$43,120.53	\$21,237.00	\$ 64,357.53
No. 3 - Shingle roof <u>repairs</u> 5 th floor Center elevation (no replacement)	Prestige	\$128.97	\$1,700.00	\$1,828.97
No. 3 - Roof Replacement 5 th floor Central roof (East-Octagon-West)	Prestige	\$132,251.64	\$68,038.50	\$200,290.14
No. 4 - Roof Replacement 4 th floor West elevation	Prestige	\$32,569.43	\$16,755.75	\$49,325.18
No. 4 - Deck Repair/Rebuild/Re-install 4 th floor roof West elevation	Prestige	\$8,980.00	\$28,175.00	\$37,155.00
No. 5 – Roof Replacement - 4 th Floor North elevation (See Amendment – did not start)	N/A	\$0	\$0	\$0
No. 6 – Roof Replacement - 1 st Floor West roof (See Amendment – did not start)	N/A	\$0	\$0	\$0
TOTALS		\$313,610.37	\$290,927.60	\$604,537.97

Copies of Receipts from QRE Table

No. 1 – New HVACs 1st floor roof East



4117 Bridgetown Road • Cincinnati, Ohio 45211-4503

513-662-2282

Fax: 513-389-7737 www.jonle.com

JOB INVOICE

Invoice Date : 01/17/2024

Printed By : fboeckert

Printed On : 01/17/2024 2:48 pm

Status : Print

Page : 1 of 1

Bill To : 52852

Ship To : 24061

Salesman	Contact	Contact Phone	Customer PO	Terms	Job #
127	Multiple		FEB-03EF	COD	26021

LINE	QTY.	SHIP	DESCRIPTION	SHIP DATE	UNIT PRICE	EXT. PRICE
1	1		HVAC		28,500.00	28,500.00

Attn: deposit due before start of job as per quote.

RESV (ps) (Date):

JAN 17 2024

Desc: Code:

GL Desc: Code:

RESV (ps) (Date):

SUB TOTAL:	28,500.00
TOTAL:	28,500.00



4117 Bridgetown Road • Cincinnati, Ohio 45211-4503

513-662-2282

Fax: 513-389-7737 www.jonle.com

JOB INVOICE

Invoice Date : 03/13/2024

Printed By : fboeckert

Printed On : 03/13/2024 3:25 pm

Status : Print

Page : 1 of 1

Bill To : 52852

Ship To : 24061

Salesman	Contact	Contact Phone	Customer PO	Terms	Job #
127	Multiple		FEB-03EF	COD	26021
LINE	QTY. SHIP	DESCRIPTION	SHIP DATE	UNIT PRICE	EXT. PRICE
2	1	HVAC		64,884.00	64,884.00
		Remaining unpaid balance of the HVAC work @ [REDACTED] Total \$93,384.00 less deposit of \$28,500.00 = \$64,884.00 less roof repair invoice \$526.47 = \$64,357.53			
3	-1	Roof repair credit		526.47	-526.47
4	1	1-YEAR LABOR WARRANTY		0.00	0.00
5	1	5-YEAR FACTORY PARTS WARRANTY		0.00	0.00
GL Desc: [REDACTED] GL Code: [REDACTED] MAR 25 2024 Ops ☒ RESV Holding Notes (Date):					

SUB TOTAL :	64,357.53
TOTAL :	64,357.53

No. 1 - Skylights 1st floor roof East

Mueller Roofing Distributors, Inc.
327 E. Wyoming Avenue
Cincinnati, OH 45215



INVOICE

Invoice Date	Due Date	Customer #	Terms
10/24/24	12/24/24	[REDACTED]	2% 60 n61
[REDACTED]		Ship Point	** Drop Ship **

Holland Roofing SPD
7450 Industrial Rd
Florence, KY 41042

Ship To
Holland Roofing SPD
7450 Industrial Rd
(513)-831-9444
Holland SPD Shop
Florence, KY 41042

REMIT TO:	Mueller Roofing Distributors, Inc., P.O. Box 781, MI	044-0781
Instructions	Ship Via	Shipped
Notes	Vendor Dist	10/24/24
		Taken By
		JAPR

General Manager Approved

Line	Product and Description	Order Qty	Shipped Qty	Qty UM	Unit Price	Amount
1	VCM 3046 2004 30 x 46 Fresh Air VCM Skylight	2.00	2.00	EACH	990.00	1,980.00
2	16657 Velux FCM 3046 Laminated Low E 0004	2.00	2.00	EACH	432.00	864.00
2	Lines Total	Qty Shipped Total	4.00		Subtotal	2,844.00
					Taxes	191.97
					Total	3,035.97

Cash Discount 56.88 If Paid Within Terms



INVOICE NUMBER : 5481-1

Bill To :



Job Site :



Attention : Accounting Department

Invoice Date	Customer #	Project #	Sub	Department	Payment Terms	Customer P.O #
10/1/2024					Payment Due Upon Receipt	
Description / Reference						Line Total
Governor's Point						
Billing in full for (14) condensing units and Labor						
Project Amount: 37,859.00						
Previous Billing: 0.00						
Billing This Period: 37,859.00						37,859.00
Amount Remaining to Bill: 0.00						
GL Desc: 303022						
GL Code: 303022						
OCT 07 2024						
Ops RESV						
Holding Notes (Date):						
AMOUNT DUE						\$ 37,859.00

Please Remit To :

IVEY MECHANICAL COMPANY, LLC

PO Box 610

Kosciusko, MS 39090

859.254.8678

Fax: 859.233.0770

24 Hour Service: 1-866-ServeKY

Thank You For Your Business

No. 1 - Roof Replacement 1st floor East- (1 of 2 payments)



Holland Roofing SPD
7450 Industrial Rd.
Florence, KY 41042
(859) 525-0887
INVOICE

INVOICE SUBMITTED TO [REDACTED]	INVOICE # [REDACTED]	DATE 11/25/2024
STREET [REDACTED]	JOB NAME [REDACTED]	
CITY, STATE, AND ZIP CODE [REDACTED]	JOB LOCATION [REDACTED]	
YOUR ORDER NUMBER	OUR ORDER NUMBER [REDACTED]	TERMS
DESCRIPTION	WORK COMPLETED	AMOUNT DUE
ReRoof / Tear Off Partial Billing November 2024		
GROSS AMOUNT DUE THIS APPLICATION	\$100,000.00	
NET AMOUNT DUE THIS APPLICATION		\$100,000.00
GL Desc: GL Code:		[REDACTED]
IAN 09 2025		Operating!!!
TOTAL DUE		\$100,000.00

✓ Ups RESV
Holding Notes (Date):



Holland Roofing SPD
7450 Industrial Rd.
Florence, KY 41042
(859) 525-0887

INVOICE

GL Desc:
GL Code:

JUN 17 2025

Ops ☒ RESV
Holding Notes (Date): 3/10/22

INVOICE SUBMITTED TO [REDACTED]	INVOICE # [REDACTED]	DATE 1/20/2025
STREET [REDACTED]	JOB NAME Governor's Point	
CITY, STATE, AND ZIP CODE [REDACTED]	JOB LOCATION [REDACTED]	
YOUR ORDER NUMBER	OUR ORDER NUMBER [REDACTED]	TERMS
DESCRIPTION	WORK COMPLETED	AMOUNT DUE
ReRoof / Tear Off Final Billing January 2025		
GROSS AMOUNT DUE THIS APPLICATION	\$15,511.00	
NET AMOUNT DUE THIS APPLICATION		\$15,511.00
	TOTAL DUE	\$15,511.00

EYM MASONRY

Kevin Fitzpatrick, President

859-760-0504



DATE 3-20-24
CLIENT [REDACTED]
ADDRESS _____
CITY _____
STATE _____
PHONE _____
JOB SITE [REDACTED]

LABOR		
REQUIRED	Tuckpoint brick &	5,650 00
	Secure Balusters around	
	Octagon in the center of roof	
MATERIALS		
REQUIRED	Mortar Type N, sand,	
	color	250 00
	Installation included in	
	price but not the cost of	
	new Balusters	5,900 00
TOTAL ESTIMATED COST		

THANK YOU,

A handwritten signature in dark ink, appearing to read "Kevin Fitzpatrick".

EYH MASONRY

Kevin Fitzpatrick, President

859-760-0504



Date 3-20-24

Client [REDACTED]

Address [REDACTED]

City [REDACTED]

State [REDACTED]

Phone [REDACTED]

Job Site [REDACTED]

Labor Required

Secure & Repair. Four dif.
ferent Sections on back of building
2,800.00 1 Section

11,200 00

Materials Required

Mortar Type N, sand,
color & Fortifier

250 00

*Does not include price of any
new Balusters (installation
included thoo) *

11,450 00

TOTAL ESTIMATE COST

Thank You,

[Signature]

No. 2 - Roof Replacement 4th floor East

October 20, 2025, 2025

labor draw #1

Prestige Complete Home Care
821 Thorton Street
Dayton ky. 41074

Ref: [REDACTED]
INVOICE

Client:

[REDACTED]
[REDACTED]

Location:

[REDACTED]

4th Floor West
4th Floor East
5th Floor

Material cost per contract have been paid in full. 4th Floor east is completed; all materials have been purchased for all roofs. All custom metals have been made and are on site. The roof should have fully been completed by now. After removing old foam roof, we discovered over 26 different holes in concrete roof ranging from 4 inch circles and 9 different square holes used for some duc system from years ago. We were forced to build the roofs completely before we could install insulation board and TPO. The main 5th floor will be completed today October 21,2025.

Payment #1 LABOR DRAW

MATERIAL COST TOTAL PAID

\$197,390.50

Labor TOTAL

\$101,550.00

[REDACTED]

■ [REDACTED]

■ [REDACTED]

■ [REDACTED]

■ [REDACTED]

■ [REDACTED]

Prestige

COMPLETE HOME CARE

859.878.4402

kevinsjohn77@gmail.com

Invoice No. [REDACTED]

DATE 3/15/26

CUSTOMER [REDACTED]

ADDRESS [REDACTED]

CITY Covington STATE Ky ZIP 41011

HOME PHONE () WORK/CELL ()

QUANTITY ID STK	JOB DESCRIPTION	UNIT PRICE	AMOUNT
①	Balance of the shingle roof Fully Completed on 3/15/26		
	\$1,700 ⁰⁰	Labor	\$1700 ⁰⁰
②	Had to buy 3 more bundle of onyx Black shingles that exceeded the material estimate.	42.99 x 3	\$128 ⁹⁷

TERMS: NET

Signature X Kevin John

SPECIAL INSTRUCTIONS

Sent Paul Pics

ESTIMATED TIME of ARRIVAL
APPROXIMATELY _____ WEEKS

Salesperson

K J

THANK
YOU!

NET SALE \$1828⁹⁷

DELIVERY & SET-UP

SALES TAX

TOTAL SALE \$1828⁹⁷

DEPOSIT
☐ CASH ☐ CC
☐ CHECK

BALANCE
☐ CASH ☐ CC
☐ CHECK \$1828⁹⁷

MERCHANDISE RECEIVED IN GOOD CONDITION X

Prestige
COMPLETE HOME CARE

859.878.4402

kevinsjohn77@gmail.com

Invoice No. [REDACTED]

DATE 6/29/26

CUSTOMER [REDACTED]

ADDRESS [REDACTED]

CITY Covington STATE Ky ZIP 41011

HOME PHONE () WORK/CELL ()

Final Payment for 4th West Roof/Deck

QUANTITY ORD STK	JOB DESCRIPTION	UNIT PRICE	AMOUNT
★	Original labor cost per contract as described on page (4 of 6) of the details was \$16,500 ⁰⁰ labor for main roof and \$6,500 ⁰⁰ for deck tear down / rebuild using material that was already cut and ready to reassemble.	Original Labor	16,500 ⁰⁰
★	Due to unforeseen rot of the deck and (6) large holes in main roof concrete causing Full roof to be framed and built. All 45 Ft by 47 Ft was built, sheeted, insulated and TPO.	Added labor to Frame Full roof, deck, and Frame PVC grid over TPO on top of Frame. All Added	#5,175 ⁰⁰
★	Deck was a total repair, steel beams cut, removed, and Frame sealed in roof to prevent future rot	Minus paid	#2,233 ⁸⁷
★	Copies of receipt all sending to Greg	due	25,941.13
TERMS: NET		ESTIMATED TIME OF ARRIVAL	NET SALE
Signature X <u>Kevin John</u>		APPROXIMATELY _____ WEEKS	\$28,175 ⁰⁰
SPECIAL INSTRUCTIONS		Salesperson	DELIVERY & SET-UP
★ 16,500 ⁰⁰ Roof original		K. J	Paid out of 1st draw
★ 6,500 ⁰⁰ Deck original			\$2,233 ⁸⁷
Material labor / draw #6200 ⁰⁰ (was materials)		SALES TAX	included on receipts
• Material draw of #8980 ⁰⁰ For Deck		TOTAL SALE	25,941.13
Receipts total #9,311.72		DEPOSIT	
Labor received #2,233.87		☐ CASH ☐ CHECK	
MERCHANDISE RECEIVED IN GOOD CONDITION X		BALANCE	\$25,941.13
		☐ CASH ☐ CHECK	

ADD 2% to pricing for credit card purchase.

WHITE - Master

CASH - Cash

**THANK
YOU!**

Prestige

COMPLETE HOME CARE

859.878.4402

kevinsjohn77@gmail.com

Invoice No. 002-169

DATE 6/21/26

CUSTOMER

ADDRESS

CITY Covington

STATE Ky

ZIP 41011

HOME PHONE ()

WORK/CELL ()

QUANTITY ORD STK	JOB DESCRIPTION	UNIT PRICE	AMOUNT
	Material / Labor Draw		
1)	Discovery of damaged Frame on the Deck, on 4th Floor West roof 60% to 70% of structure is totally rotten.		\$8980.00
	The fasteners for decking was destroyed when they put Floor down.		
	New design to have Frame work inside T.P.O. roof has unforeseen material cost.		

TERMS: Net

Signature X

SPECIAL INSTRUCTIONS

ESTIMATED TIME of ARRIVAL

APPROXIMATELY WEEKS

NET SALE

\$8,980.00

DELIVERY & SET-UP

SALES TAX

TOTAL SALE

DEPOSIT

CASH C

CHECK

BALANCE

CASH C

CHECK

\$8,980.00

THANK
YOU!

MERCHANDISE RECEIVED IN GOOD CONDITION X