



State Of Oklahoma

Reporting Form for the Transfer, Allocation, or Assignment of a Tax Credit

AMENDED
REPORT!
Place an 'X' here if
this is an Amended
Report:
→

FORM **569**
Revised 2025

| | | | |
|---|--|------------------|---------------------|
| Part 1 – General Information | | Tax Year: | FEIN or SSN: |
| Name of Person/Entity Transferring, Allocating, or Assigning a Credit: | | | |
| Address: | | | |
| City, State and ZIP: | | Phone Number: | |
| Select One: <input type="checkbox"/> Individual <input type="checkbox"/> Partnership <input type="checkbox"/> S-Corporation <input type="checkbox"/> Corporation <input type="checkbox"/> Fiduciary <input type="checkbox"/> Limited Liability Company | | | |
| Select One: <ul style="list-style-type: none"> <input type="checkbox"/> 1. You are filing this report as the person/entity who originally generated the credit. -or- <input type="checkbox"/> 2. You are filing this report as the person/entity to whom a credit was transferred, allocated, or assigned and who is transferring, allocating, or assigning any portion of such credit to another person. <p>If you selected Number 2, enter the Name and FEIN/SSN of the person who transferred, allocated, or assigned the credit to you.</p> <p>Name: _____ FEIN/SSN: _____</p> | | | |

Part 2 – Credit Information

1. Enter the name of the credit as shown on page 4: _____
2. Enter the line number of this credit from page 4: _____
3. Enter amount of credit transferred, allocated, or assigned: \$ _____

Part 3 – Transfer Information (Complete if any portion of the credit was transferred or assigned)

| Transferee/Assignee Name | FEIN/SSN | Transfer/Assignment Date | Amount of Credit Transferred/Assigned |
|--|----------|--------------------------|---------------------------------------|
| 1) | | | |
| 2) | | | |
| 3) | | | |
| 4) | | | |
| 5) | | | |
| 6) | | | |
| 7) | | | |
| 8) | | | |
| 9) Total from Supplemental Schedule | | | |
| 10) Total amount of credit that was transferred/assigned (add Part 3 lines 1 - 9) | | | |

(For allocated credits, complete Part 4 on page 2.)

Under penalty of perjury, I declare I have examined this return, and to the best of my knowledge and belief it is true, accurate, and correct.

| | | | | |
|--------------|------|--|-----------------------|------|
| Signature | Date | Check this box if the Oklahoma Tax Commission may discuss this report with your tax preparer. | Signature of Preparer | Date |
| Phone Number | | <input type="checkbox"/> | Preparer Phone Number | |

The Oklahoma Tax Commission is not required to give actual notice to taxpayers of changes to any state tax law.

Reporting Form for the Transfer, Allocation, or Assignment of a Tax Credit

68 Oklahoma Statutes (OS) Section 2357.1A-2

**Part 4 – Allocation Information (Complete if any portion of the credit was allocated)**

| Name of Shareholder, Partner, or Member | FEIN/SSN | Amount of Credit Allocated | “X” if a PTE |
|---|----------|----------------------------|--------------|
| 1) | | | |
| 2) | | | |
| 3) | | | |
| 4) | | | |
| 5) | | | |
| 6) | | | |
| 7) | | | |
| 8) | | | |
| 9) | | | |
| 10) | | | |
| 11) | | | |
| 12) | | | |
| 13) | | | |
| 14) | | | |
| 15) | | | |
| 16) | | | |
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| 18) | | | |
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| 25) | | | |
| 26) | | | |
| 27) | | | |
| 28) | | | |
| 29) | | | |
| 30) | | | |
| 31) | | | |
| 32) | | | |
| 33) Total from Supplemental Schedule | | | |
| 34) Total amount of credit that was allocated (add Part 4 lines 1 - 33) | | | |

Reporting Form for the Transfer, Allocation, or Assignment of a Tax Credit

68 OS Sec. 2357.1A-2 and Rule 710:50-3-55

Reporting Requirements

Use Form 569 to report any tax credit authorized under Title 68 of the Oklahoma Statutes that you have transferred, allocated, or assigned. You must file this form with the Oklahoma Tax Commission on or before the 20th day of the second month following the tax year in which you transferred or allocated the tax credit.

Important: If you claim a credit on any state tax return without first reporting it on Form 569, the credit will be disallowed. The credit will only be allowed after you file the required Form 569.

Amended Report

If you are amending Form 569, place an 'X' in the Amended Report box. The amended report will supersede the original report in its entirety. Fill out the form completely; do not provide just supplemental information.

Part 1 – General Information

Tax Year:

If you are the person who originally generated the credit, enter the tax year in which the credit was generated. If the credit was transferred, allocated, or assigned to you, enter the tax year the credit was transferred, allocated or assigned to you.

Part 2 – Credit Information (See Page 4 for a list of all transferable, allocable or assignable credits)

1. Enter the name of the credit as shown on page 4.
2. Enter the line number from page 4 that corresponds to this credit.
3. Enter the amount of the credit you have transferred, allocated, or assigned to another person and are reporting on this form. This amount should equal the total reported in Parts 3 and 4.

Part 3 – Transfer Information (Complete Part 3 if you transferred or assigned a credit.)

List the name, Federal Identification Number, date of transfer or assignment, and amount of credit that was transferred or assigned to each transferee. If additional rows are needed, attach a Supplemental Schedule using the same format as Part 3 and carry the total from the schedule to line 9.

Part 4 – Allocation Information (Complete Part 4 if you are a pass-through entity (PTE) and you allocated a credit.)

List the name, Federal Identification Number and amount of credit that was allocated to each shareholder, partner, or member. Place an 'X' in the column if the shareholder, partner, or member is itself a PTE. If additional rows are needed, attach a Supplemental Schedule using the same format as Part 4 and carry the total from the schedule to line 33.

This form may be filed electronically. To access this form, visit oktap.tax.ok.gov.

If not filing electronically, mail this form, including any supplemental schedules, to:

**Oklahoma Tax Commission
PO Box 26800
Oklahoma City, OK 73126-0800**

Reporting Form for the Transfer, Allocation, or Assignment of a Tax Credit
68 OS Sec. 2357.1A-2 and Rule 710:50-3-55

| Name of Credits that are Transferable, Allocable, or Assignable | | Allocable | Transferable Assignable |
|---|--|-----------|----------------------------|
| 1 | Oklahoma Investment/New Jobs Credit | Allocable | |
| 2 | Credit for Verified Blood Donation | Allocable | |
| 3 | Credit for Investment in a Clean-Burning Motor Vehicle Fuel Property | Allocable | |
| 4 | Credit for Venture Capital Investment (Transferable for 3 years) | Allocable | Transferable |
| 5 | Credit for Qualified Rehabilitation Expenditures | Allocable | Transferable |
| 6 | Credit for Electricity Generated by Zero-Emission Facilities (With respect to electricity generated by wind, the facility must be placed in operation no later than July 1, 2017.) | Allocable | |
| 7 | Credit for Railroad Modernization | Allocable | Transferable |
| 8 | Credit for Biomedical Research Contribution | Allocable | |
| 9 | Credits for Employers in the Aerospace Sector | Allocable | |
| 10 | Credit for Cancer Research Contribution | Allocable | |
| 11 | Oklahoma Capital Investment Board Tax Credit | Allocable | |
| 12 | Credit for Contributions to a Scholarship-Granting Organization | Allocable | |
| 13 | Credit for Contributions to an Educational Improvement Grant Organization | Allocable | |
| 14 | Oklahoma Affordable Housing Tax Credit | Allocable | |
| 15 | Credits for Employers in the Vehicle Manufacturing Industry | Allocable | |
| 16 | Credit for Oklahoma Rural Jobs | Allocable | |
| 17 | Credit for Contributions to an Eligible Public School Foundation or Public School District | Allocable | |
| 18 | Credit for Strategic Industrial Development Enhancement (SIDE) Projects* | Allocable | Assignable |
| 19 | Electric Vehicle Charging Tax Credit | Allocable | |

*The credits allowed that are not used may be assigned to a qualifying project affiliate by written agreement at any time during the five years following the tax year the qualified expenditures are incurred. 68 OS Sec. 2357.105.