

# INSTRUCTIONS FOR COMPLETING THE EZB-R

## Part 1 General Information

- Line 1: Enter legal name of the business.  
Line 2: Enter the business telephone number (including area code).  
Line 3: Enter the mailing address of the business  
Line 4: Enter the address of the business location in the enterprise zone/district or investment location.  
Line 5: Enter the social security number or the federal identification number of the business.  
Line 6: Check the appropriate organizational form of the business.  
Line 7: Enter the e-mail address
- Line 8: List the total number of employees at the zone/district location on the 15<sup>th</sup> of each month, add the column, divide by 12 and enter the number on line 8. **Example for Line 8:**

<u>Date</u>	<u>Employees</u>
Jan 15	30
Feb 15	30
Mar 15	30
Apr 15	30
May 15	30
Jun 15	45
Jul 15	45
Aug 15	45
Sep 15	25
Oct 15	25
Nov 15	30
Dec 15	30
Year Total	395

$$395 \div 12 = 32.9$$

Enter 32.9 on line 8

- Line 9: List the total number of zone/district residents employed at the zone/district location of the 15<sup>th</sup> day of each month, divide the resulting figure by 12 and enter the number on line 9 (see example in line 8 instructions) **Every participating business must complete this line, even if your business does not utilize the hiring tax credits.**
- Line 10: Enter the total of all wages and salaries paid at the zone/district location for the calendar year for which you are filing.  
Line 11: Enter the total wages and salaries paid to zone/district resident employees at the zone/district location for the calendar year for which you are filing.  
Line 12: Enter the total number of Enterprise zone/district Qualified Employee Certificates (IT-40QEC) issued for the calendar year for which you are filing.  
Line 13: Enter the total number of new jobs created at the zone/district location during the calendar year for which you are filing.  
Line 14: Enter the total number of new jobs filled by zone/district residents during the calendar year for which you are filing.

## Part II Tax Savings Summary

If you are a new business or have no tax savings to report for the calendar year for which this form applies, please skip to part III of this form.

- Line 15: Enter the total Enterprise zone/district Investment Deduction  
Line 15A: Enter the total Tax Savings from the Enterprise Zone Investment Deduction  
Line 16: Enter the Loan Interest Credit from Schedule LIC (only available to those loans prior to December 31, 2017)  
Line 17: Enter Employment Expense Credit (Part II, Schedule EZ) (not available for Entrepreneur Districts)  
Line 18: Add the amounts of line 15A through line 17

## Part III Registration Fee and Eligibility

- Line 19: If the total on line 18, Part II exceeds \$1,000, multiply the amount by .01 and enter that amount on this line. If a zone/district business receives tax saving incentives in excess of \$1,000 in any year, the business **MUST** pay an annual registration fee of one percent (1%) of its tax savings to the Association of Indiana Enterprise Zones, or be denied credits and incentives, and disqualified from further participation according to IC 5-28-15-7. **REMIT THE AMOUNT ON THIS LINE WITH THE ORIGINAL EZB-R TO: ASSOCIATION OF INDIANA ENTERPRISE ZONES, P.O. BOX 1322, EVANSVILLE, IN 47706. You must still submit an EZB-R even if your business does not owe a registration fee!**
- Line 20: Multiply the amount on 18, Part II of this form by the local UEA rate and enter that amount on this line (please contact the local UEA to determine the rate) **REMIT THE AMOUNT ON THIS LINE TO THE LOCAL UEA WITH A COPY OF THE EZB-R.**
- Line 21: New Capital Investment for the Calendar Year
- A. Enter the total dollar amount spent in the calendar year for zone/district business renovation and improvements at the zone location.
  - B. Enter the total dollar amount spent in the calendar year for new equipment at the zone/district location.
  - C. Enter the total dollar amount spent in the calendar year for new technology equipment at the zone/district location.
  - D. Enter the total dollar amount spent in the calendar year for new logistical distribution equipment at the zone/district location.
  - E. Enter the total dollar amount spent in the calendar year for new research & development equipment at the zone/district location.
- Line 22: Enter the amount of zone/district resident employee wages for the calendar year that exceeds each taxpayer's base period qualified wages AND/OR the total dollar amount spent on employee training. (For this particular calculation, the base year is the first year the zone was enacted)
- Line 23: Add lines 19 through 22 and enter that amount on this line.

## Signature Lines

Corporate/firm officer must sign this form and print name below written signature. **Failure to sign and print name and title may delay processing and may result in your form being returned to you.** If someone other than the corporate/firm officer prepared this form, their name, signature, address, e-mail and telephone number are required.

