

**HOMEOWNER/OWNER OCCUPIED  
HERITAGE STRUCTURE REHABILITATION TAX CREDIT  
CERTIFICATION**

**APPLICATION CHECKLIST**

**Office of Preservation Services  
Maryland Historical Trust**

This checklist should be used by applicants to ensure that their tax certification application contains at least the minimum documentation required for review as outlined below. This outline is based on the detailed instructions included in the state *Heritage Preservation Certification Application*.

**CHECK EACH ITEM, AS APPLICABLE, AND RETURN THE CHECKLIST WITH THE APPLICATION TO THE MARYLAND HISTORICAL TRUST (MHT). THE APPLICATION REVIEW PERIOD DOES NOT BEGIN UNTIL A COMPLETE APPLICATION HAS BEEN RECEIVED.**

The owner and/or authorized project contact should keep a **complete duplicate copy of all application information** sent to the MHT, including photos and plans, as the MHT staff may need to discuss the application with the applicant.

**PART 1 INFORMATION** – Property Address \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_ **APPLICATION FORM** – All spaces must be completed on the front and back of form.

\_\_\_\_\_ **OWNER’S SIGNATURE AND SOCIAL SECURITY NUMBER** – All owners must sign the form and provide their Social Security Number(s), including both husband and wife where property is jointly owned. See page 5 of the state application instructions for information on signatures needed for corporations or partnerships.

\_\_\_\_\_ **MAP** – A map, which clearly indicates the historic structure’s location within the historic district as-well-as showing the boundaries of the entire district or heritage area (if applicable). See page 7 of the state application instructions for information on map requirements.

\_\_\_\_\_ **PHOTOGRAPHS** – 1 set of original photographs and a CD of the photographs must be submitted with state tax credit applications. See page 7 of the state application instructions for information on photographic requirements. You may also refer to the document entitled *Photographic Documentation Requirements Homeowner/Owner-Occupied State Historic Rehabilitation Tax Credit Programs*.

\_\_\_\_\_ **MOVED STRUCTURES, PROPERTIES WITH MULTIPLE STRUCTURES, CERTIFICATIONS OF NON-SIGNIFICANCE OR PROPERTIES LESS THAN 50 YEARS OLD** - A Part 1 application for a building that falls into any of the above categories must contain additional information. See pages 7 and 8 of the state application instructions.

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Preparer’s Signature

Date

**PART 2 INFORMATION** – Property Address \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_ **APPLICATION FORM** – All applicable lines on the front of the form must be completed.

\_\_\_\_\_ **OWNER’S SIGNATURE AND SOCIAL SECURITY NUMBER** – All owners must sign the form and provide their Social Security Number(s), including both husband and wife where property is jointly owned. See page 9 of the state application instructions for information on signatures needed for corporations or partnerships.

\_\_\_\_\_ **DESCRIPTION OF REHABILITATION WORK** – The blocks/paragraphs beginning on the back of the first page of Part 2 should describe the work in detail. All of the items listed below will be considered during the project review, if applicable to the structure in question. If any of the following architectural features are not included in the proposed rehabilitation project, that feature should be marked “N/A” (not applicable). This will clarify for the reviewer of the application that the feature either does not exist as part of the structure or is not receiving work as part of the rehabilitation project.

**SITE**

- \_\_\_\_\_ immediate grounds, landscape
- \_\_\_\_\_ outbuildings – date, location, use
- \_\_\_\_\_ setting in the neighborhood, relation to surrounding structures/properties

**EXTERIOR**

- |                           |   |
|---------------------------|---|
| _____ foundation          | _____ vents, grates, grills                       |
| _____ walls, all facades  | _____ chimneys, flues, vents                      |
| _____ porches, steps      | _____ roof  |
| _____ doorways, doors     | _____ decorative features, details, ornamentation |
| _____ window frames, sash |   |

**INTERIOR**

- |   |                           |
|---|---------------------------|
| _____ floor plan, interior space arrangements                                   |                           |
| _____ walls, ceilings   | _____ floors              |
| _____ doors   | _____ windows             |
| _____ stairs  | _____ fireplaces, mantels |
| _____ decorative features, details, ornamentation (wood trim, plaster moldings) |                           |

## **STRUCTURAL SYSTEM**

\_\_\_\_\_ framing (floor, wall, roof)

## **MECHANICAL SYSTEMS, UTILITIES, SERVICES**

\_\_\_\_\_ HVAC (heating, ventilating, air conditioning)

\_\_\_\_\_ plumbing

\_\_\_\_\_ electrical wiring

\_\_\_\_\_ gas piping

\_\_\_\_\_ lighting fixtures

## **ADDITIONS/ALTERATIONS**

\_\_\_\_\_ date

\_\_\_\_\_ description in relation to original building (all exterior and interior elements found above should be addressed, if applicable).

\_\_\_\_\_ **STOREFRONT ALTERATIONS, INTERIOR PARTITION AND PLASTER REMOVAL, WINDOW REPLACEMENT, MASONRY CLEANING AND REPAIR** – A Part 2 application that includes any of the above treatments must contain additional information. See pages 11 and 12 of the state application instructions.

\_\_\_\_\_ **PHOTOGRAPHS** – 1 set of original photographs and a CD of the photographs must be submitted with state tax credit applications. See page 7 of the state application instructions for information on photographic requirements. You may also refer to the document entitled *Photographic Documentation Requirements Homeowner/Owner-Occupied State Historic Rehabilitation Tax Credit Programs*. Since structures that are individually listed on the National Register are not required to submit a Part 1, Part 2 should include the kinds of photos outlined for Part 1. In addition to Part 1 photos, Part 2 photos should include additional representative interior spaces and details from all floors of the building.

\_\_\_\_\_ **PLANS AND SPECIFICATIONS** – A set of plans and specifications for projects which include alterations to the existing floor plan or other structural changes. A separate set of floor plans must be provided for the existing room arrangement and for proposed changes to that arrangement. Photographs should be keyed to the set of existing condition floor plans showing the location and direction the camera was facing.

\_\_\_\_\_ **REVIEW FEE** – A \$10.00 processing fee in the form of a personal check made payable to Maryland Historical Trust must accompany all Part 2s.

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Preparer's Signature

Date

**PART 3 INFORMATION** – Property Address \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_ **PART 2 REVIEW COMPLETED** – A Part 2 application must be submitted with the Part 3 (Request for Certification of Completed Work/Rehabilitation) if one has not already been submitted prior to rehabilitation.

\_\_\_\_\_ **APPLICATION FORM** – All applicable lines on the front of the form must be completed.

\_\_\_\_\_ **OWNER’S SIGNATURE AND SOCIAL SECURITY NUMBER** – All owners must sign the form and provide their Social Security Number(s), including both husband and wife where property is jointly owned. See page 14 of the state application instructions for information on signatures needed for corporations or partnerships.

\_\_\_\_\_ **PHOTOGRAPHS** – 1 set of original photographs and a CD of the photographs must be submitted with state tax credit applications. See page 7 of the state application instructions for information on photographic requirements. You may also refer to the document entitled *Photographic Documentation Requirements Homeowner/Owner-Occupied State Historic Rehabilitation Tax Credit*. These photographs should show the same views as the “before” photographs submitted with Parts 1 and 2. “After” photographs should be specifically identified on the back with street address and city, date of photograph, and a brief description of what is illustrated (photographs only) (i.e., of 1<sup>st</sup> floor, front right room, photographer facing east). They should also be numbered to correspond with the “before” photographs and slides except where “before” and “after” photos and slides do not correspond. **If “before” and “after” photo views do not correspond, sketch floor plans should be included and the “after” photos keyed to the “after” plans.** Photographs that are not identified in this way will be returned for labeling and the application considered incomplete until resubmission. A cover letter and photographs should also be submitted documenting conformance with any conditions to certification, which may have been imposed in the preliminary Part 2 review.

\_\_\_\_\_ **REVIEW FEE** – The fee for certification of Part 3 is 1% of the tax credit amount (20% of your qualified rehabilitation expenditures, less \$10) in the form of a check made payable to Maryland Historical Trust.

\_\_\_\_\_ **COMPLETE DUPLICATE COPY OF ALL INFORMATION MADE FOR APPLICANTS RECORDS.**

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Preparer’s Signature

Date