



APPLICATION AND GUIDELINES OKLAHOMA CITY FILM INCENTIVE PROGRAM

Effective December 1, 2022

FOR QUALIFICATION QUESTIONS, CONTACT:

Jill Simpson | Oklahoma City Film & Creative Industries Office | jsimpson@okcchamber.com | 405.297.8975

Jeff Seymour | Greater OKC Chamber of Commerce | jseymour@okcchamber.com | 405.297.8991

SUBMIT APPLICATION TO:

Jill Simpson | jsimpson@okcchamber.com | 405.297.8975

ALL OTHER QUESTIONS ABOUT THE OKLAHOMA CITY FILM INCENTIVE PROGRAM:

Joanna McSpadden | City of Oklahoma City | joanna.mcspadden@okc.gov | 405.297.3879

Jill Simpson | jsimpson@okcchamber.com | 405.297.8975

GENERAL RULES

1. **Productions receiving the “Point of Purchase Sales Tax Exemption” from the State of Oklahoma ARE NOT eligible for the receipt of Oklahoma City film incentives.**
2. Before applying, productions must speak with Jill Simpson, Executive Director of the Oklahoma City Film & Creative Industries Office: jsimpson@okcchamber.com, 405.297.8975 and spend a minimum one day scouting.
3. **Applications should be completed and submitted**, to include all required information, **no later than sixty (60) days** before pre-production begins. **Principal photography for feature film projects must begin within 180 days** of the effective date of an incentive contract and **within 90 days for scripted television pilots, scripted television series, and reality programs**. Any changes to the start date must be notified and re-certified by Jill Simpson of the Oklahoma City Film and Creative Industries Office and Joanna McSpadden of the City of Oklahoma City, joanna.ferguson@okc.gov.
4. Applications may not be accepted **more than one hundred and twenty (120) days** prior to start of principal photography.
5. An applicant can qualify only once per fiscal year, per project (July 1 – June 30). Exceptions may be made for episodic series. An applicant is defined as the company actually entitled to receive the rebate with any common ownership, corporate officers or other verifiable affiliation. Work-for-hire companies are not eligible for the rebate.
6. **Only one (1) application will be allowed per project. If your project has been rejected, you may not resubmit.**
7. The person who is responsible for the ledger **must sign the application.**



PROJECT DESCRIPTION

Title of Project: Total Project Budget:

Type of Production:

- Feature Film
- TV Pilot
- Reality Program
- Television or Internet-Distributed Episodic Production

If Television or Internet-Distributed Episodic Production

Network/Internet Distributor:

Season Number:

Number of Episodes:

Length of Episodes:

Description of Project (Story Line):

Script Attached? YES

Budget Attached? YES

Pre-Production

Start Date:

Wrap Date:

Principal Photography

Start Date:

Wrap Date:

Post-Production

Start Date:

Wrap Date:

Talent Attached:

Description of Required Locations:

Additional Comments:



OKLAHOMA CITY BUDGET INFORMATION

Crew – Total qualifying expenditures for Personnel hired for the pre-production, production, and post-production of the project does not include Above-the-Line Personnel). OKC residents include persons residing in the city limits of OKC and the OKC metro area for at least 6 months prior to hire date. The “OKC metro area” includes residents of Canadian, Cleveland, Grady, Lincoln, Logan, McClain and Oklahoma counties, and any Oklahoma City resident residing in Pottawatomie County.

Estimated total number of Crew:

Estimated total of OKC metro area residents hired as Crew:

Estimated number of work days employing OKC metro area residents as crew:

Total budgeted Oklahoma City metro area labor expenditures:

Projected percentage of crew that are residents of OKC metro area:

Above-the-line (ATL) expenditures – Includes individuals hired or credits on screen for the production as producers, principal cast, screenwriters, and directors. Qualifying expenditures for ATL personnel may not exceed 25% of total qualifying expenditures:

Estimated number of contracts with vendors located in OKC city Limits:

Projected percentage of contracts ATL within OKC city Limits:

Vendor Rentals and Purchases – Expenditures for goods, services attributable to the pre-production, production, and post-production of the project:

Estimated number of contracts with vendors located in OKC City Limits:

Total budgeted Oklahoma City goods and services:

Projected percentage of vendor rentals and purchases within OKC city limits:

Locations/Soundstages

Estimated days shooting days:

Estimated shooting days within city limits of Oklahoma City:

Total budgeted expenditures for Oklahoma City locations contracts:

Projected percentage of shooting days within OKC city limits:



ELIGIBLE UPLIFTS

Eligible projects may increase rebates up to an additional 5%

Please mark and describe any additional uplift(s) the production intends to utilize.

Filming at a soundstage situated within city limits of Oklahoma City. Please describe:

Filming multiple or sequential projects within city limits of Oklahoma City. Please describe:

Post-production taking place at a facility situated within city limits of Oklahoma City using OKC-based contractors to perform work including but not limited to editing, foley, ADR, sound editing, negative cutting, color correction and sound mixing. Please describe:

Qualifying for Oklahoma State Film Incentive Programs. Please answer yes or no and describe:

More than 50% of crew members hired are full-time residents of Oklahoma City metro area. The "OKC metro area" includes residents of Canadian, Cleveland, Grady, Lincoln, Logan, McClain and Oklahoma counties, and any Oklahoma City resident residing in Pottawatomie County. Please describe:

More than 75% of filming days are within city limits of Oklahoma City. Please describe:

More than 50% of vendor contracts are with OKC vendors. OKC vendors include entities selling or leasing products subject to Oklahoma City sales tax withholding and holding an Oklahoma sales tax permit. Please describe:

Use of diverse/minority contractors and vendors situated within city limits of Oklahoma City. Please describe in detail:



PRODUCTION CONTACTS

PRODUCER

Name:

Phone:

Email:

LINE PRODUCER

Name:

Phone:

Email:

EXECUTIVE RESPONSIBLE FOR PRODUCTION LEDGER

Name:

Phone:

Email:

UNIT PRODUCTION MANAGER

Name:

Phone:

Email:

PAYROLL SERVICE

Name of Payroll Service:

Phone:

Primary Contact:

Email:

ATTORNEY INFORMATION

Attorney Name:

Address:

Phone:

Email:

Firm Name:

City/State/ZIP/Country:

Fax:

COMPANY TYPE

Choose One

Unincorporated Individual Limited Liability Corporation [LLC] *State Employer ID No.:

Partnership Corporation Federal ID No.:

***Note:** If application is pending with the Oklahoma Secretary of State, please include copy of application.

OFFICERS, PARTNERS, SHAREHOLDERS AND MEMBERS OF APPLICANT

I hereby certify that I have provided a full and complete list of all: (a) officers (for all entity forms); (b) partners (for partnerships); (c) shareholders (for corporations); or (d) members and managing member (for limited liability companies). Please include Name / Telephone / Email and percentage of ownership for each officer, partner, or shareholder. YES



PRODUCTION APPLICANT CORPORATE INFORMATION

Company Name:

Company's Principal Production Type or Service is:

List of all productions that Company has been involved with under its name or under any different name or entity. If another name or entity was used, indicate and specify the name of the entity, and its owners or principal shareholders. (If you have additional productions, please attach a list).

Primary Contact: Title:

Address: City/State/ZIP/Country:

Phone: Fax:

Email:

Date of Incorporation: State of Incorporation:

Have you applied for the State of Oklahoma Film Rebate: YES NO

Name Used to Apply:

AFFILIATED ENTITIES OF APPLICANT

Does this company have any affiliated/related entities (e.g., subsidiaries, DBAs, etc.)? YES NO

If YES, please list the following information on all affiliated/related entities below (attach additional sheets as needed).

Affiliated Entity Name:

Affiliated Entity's Principal Production Type or Service is:

Provide a precise list of the nature of the relationship between Applicant and Affiliated Entity:

Primary Contact: Title:

Address: City/State/ZIP/Country:

Phone: Fax:

Email:

Date of Incorporation: State of Incorporation:



OKLAHOMA CITY FILM INCENTIVE PROGRAM GUIDELINES

December 1, 2022 | Program Capped at \$3 Million

UP TO 5% REBATE

MINIMUM \$500K – FEATURE FILMS | MINIMUM \$100K TV SERIES

- Minimum total qualifying expenditure of \$500,000 but less than \$5,000,000 for feature film projects
- Minimum total qualifying expenditure of \$100,000 but less than \$5,000,000 for scripted and reality television projects
- Main Production Office must be located in OKC City Limits
- More than 50% of filming days occur within OKC City Limits.
- An applicant can qualify only once per year. Exception may be made for episodic series. An applicant will be considered the same for rebate purposes if the entity entitled to receive the rebate shares any common ownership, corporate officers or other verifiable affiliation with a previous applicant
- Must scout locations and meet with the Oklahoma City Film & Creative Industries Office before applying
- Must add OKCFCIO’s Executive Director to distro list during preproduction and production. Including: Call Sheets, Crew List, Vendors’ List, Script, Schedules, DOOD’s, Safety Memos, Location Notification Letters and all memos and correspondence pertaining to the qualifying jurisdiction
- Must provide all necessary documentation for audit of application (including THE FINAL LEDGER AND EXHIBITS) within **90 days** of the completion of production. If post-production takes place in OKC City Limits, this deadline shall be extended until **90 days** from the completion of post-production within OKC City Limits.
- Display the Oklahoma City Film & Creative Industries Office logo and identify Oklahoma City as site of filming in end credits. Placement must come immediately after the Oklahoma Film & Music Office logo if that program is also utilized

UPLIFTS FOR UP TO ADDITIONAL 5%

MINIMUM \$5M – FEATURE FILM | MINIMUM \$500K TV SERIES

The same requirements listed above but with minimum total qualifying expenditures of \$5,000,000 for feature film and \$500,000 for television projects.

- Qualifying Factors for additional Uplifts:
- Filming on an Oklahoma City Sound Stage
- Filming more than one qualifying feature film
- Filming multiple episodes on qualifying scripted TV series
- Conducting post-production activities in OKC City Limits using local personnel
- Cost of producing and recording music in OKC City Limits and/or licensing music created by Canadian, Cleveland, Grady Lincoln, Logan, McClain or Oklahoma County residents, and any OKC residents residing in Pottawatomie County
- More than 50% of the crew are residents of OKC metro area
- More than 50% of the contracts with vendors that sell or lease products subject to OKC City sales tax withholding and holding an OKC sales tax permitare situated in OKC city limits.
- More than 75% of filming days occur within OKC City Limits
- Contracting and purchasing with diverse businesses and vendors in OKC City Limits
- Qualifying for the Filmed in Oklahoma state rebate program
- Total amount of qualified expenditures for the project
- Additional factors may be considered in awarding additional incentives

***Note:** Rebates on qualifying projects with projected local spend of more than \$10 million and including any qualifying uplifts as described above, will be capped at \$1 million.



OKLAHOMA CITY ECONOMIC DEVELOPMENT TRUST (OCEDT) INCENTIVE - CAPS AND ESTIMATED COSTS

Up to \$3 million will be made available for the incentive fund beginning December 1, 2022.

Applications will be reviewed by Greater OKC Chamber and The Alliance for Economic Development staff with recommendations made to OCEDT and will be a part of OCEDT’s budget process.

The fund is available based on a combination of a first come, first serve basis and a review/approval of the project by The Greater Oklahoma City Chamber, OCEDT staff and legal counsel, and City of OKC staff. OCEDT and the Oklahoma City Film & Creative Industries Office at all times maintain the right and ability to accept or refuse any application at their sole discretion. The incentive is available upon completion of the production and an independent audit.

Other Guidelines

1. OCEDT retains a qualified third-party firm to manage verifications and accounting of this incentive program.
2. Guidelines are subject to change. Please see www.filminokc.com for updates.

Qualified Above-the-Line (ATL) Personnel:

(Total qualifying ATL expenditures limited to 25% of the total qualifying rebate claim)

- Producer
- Director
- Screenwriter
- Principal Cast

***Qualified Below-the-Line (BTL) local expenditures:**
(Locations within city limits of Oklahoma City. Oklahoma City vendors used for transactional goods and services)

- Crew wage/salaries (including background players)
- Site Rentals
- Photography
- Sound Synchronization
- Lighting
- Editing
- Music Production, Recording, Licensing
- Security, Police
- Per Diem
- Payments to OK Loan-Out Companies
- Construction Costs within OKC
- Third Party CPA Reviews

Purchases and leases subject to OKC sales tax:

- Equipment rentals
- Parking
- Rental Vehicles
- Hotel and Motel Rooms
- Restaurant and Catering
- Craft services
- Animals

Other Costs approved by OKC such as:

- Airfare
- Healthcare Professionals
- Gas and Oil
- Production Service Companies
- Gratuities



ACKNOWLEDGEMENTS

I understand and agree that the goal of the Oklahoma City Film Incentive Program is to provide an additional benefit to productions and to promote local economic growth by ensuring that local service providers are hired and paid. Thus, I understand and agree that I have the obligation and intent to pay all local service providers in full. **YES**

I understand the producer, production manager and production accountant **MUST MEET** with one to the Regier Cox and Associates PLLC's designated project accountants (Miles Cox, Angie Doke, or Jamie Allen) prior to finalization of my production budget and/or commencement of principal photography to go over required accounting procedures. **YES**

I have read and understand the General Rules. **YES**

I have read and understand the Oklahoma City Film Incentive Program Guidelines attached. **YES**

I understand and agree that I must comply with all Oklahoma City Film Incentive Program Guidelines. I further attest that all information provided in this application is true and correct to the best of my knowledge and belief, and I understand that the provision of false information is grounds for immediate rejection of my application. **YES**



CERTIFICATION BY APPLICANT

Applicant is responsible for accuracy of all data and documentation included in this application. Initial applications are submitted to Regier Cox and Associates PLLC. Once submitted, applications will become the property of OCEDT. It is the applicant’s responsibility to inform OCEDT in the event that there are changes to any information on the application. Amendments must be sent via email to the Accounting Firm.

Upon written request, applicants shall issue any necessary authorization to the appropriate federal, state, or local authority for the release of information concerning a production being considered under these administrative rules, including but not limited to financial reports and records relating to the applicant or to the production for which this rebate is requested.

By signing below, the applicant certifies that all the information contained herein, and exhibits attached hereto are true to the best of their knowledge and are submitted for the purpose of obtaining the rebate through the Oklahoma City Economic Development Trust.

Signing and submitting this application is an acceptance of all the outlined terms and conditions.

AUTHORIZED REPRESENTATIVE OF APPLICANT

Printed Name:

Title:

Date:

Signature:

Email:

Phone:

REVIEWED AND ACCEPTED ON BEHALF OF OCEDT AND THE OKLAHOMA CITY FILM & CREATIVE INDUSTRIES OFFICE

Printed Name:

Date:

Signature:



CHECKLIST AND TIMELINE OF INFORMATION DUE

I understand that for my application to be processed, the following items
MUST BE PROVIDED AT THE TIME INDICATED. YES

PART 1. PRE-QUALIFICATIONS

Submitted within 60 days before the start of pre-production begins.

- Signed W-9
- Script
- Budget (defined as):
 - a. The Amount that is approved by the relevant completion bond company -OR-
 - b. The budget that is approved and funded by the financiers.
- Proof of Funding

Defined as at least one of the following:

 - c. Bank Statements showing adequate funding dedicated to the project with no cash restrictions.
 - d. Commitment Letters from banks and/or private funding stating the amount of the funding; and/or
 - e. Signed Contractual agreement from an authorized representative of a recognized studio or network which states the amount of the guaranteed funding.
 - f. A Completion Bond from a recognized completion bond company that works in the entertainment industry.
 - g. Any combination of funding amounting to a minimum of 30% of the total project's budget must be available at the time principal photography begins. These funding sources must be validated by Regier Cox Associates PLLC prior to commencement of principal photography. Without this validation, the application will not be accepted.

PART 2. PRE-PRODUCTION

Due one week before start of principal photography.

Send materials to Jill Simpson at the Oklahoma City Film & Creative Industries Office at jsimpson@okcchamber.com.

- Crew and Contact List
- Vendor List
- Shooting Schedule

PART 3. PRODUCTION

Send materials to Jill Simpson at the Oklahoma City Film & Creative Industries Office at jsimpson@okcchamber.com.

- Daily Call Sheets
- List of Locations



CHECKLIST AND TIMELINE OF INFORMATION DUE

PART 4. POST-PRODUCTION

Send materials to:

- Expenditures Ledger
- Local hire start paperwork
- Final Crew and Contact List
- Final Vendor List
- Final Shooting Schedule
- Final List of Locations
- OCEDT Mandatory Reporting Questions:
 - Total number of union workers employed that reside in Oklahoma City Metro Area:
 - Total number of non-union workers employed that reside in Oklahoma City Metro Area:
 - Total number of diversity hires:
 - Total number of second chance hires:
 - Total number of veteran hires:

PART 5. DELIVERY

Send materials to Jill Simpson at the Oklahoma City Film & Creative Industries Office at jsimpson@okcchamber.com.

- Electronic Press Kit
- Three Posters of the Type Designed for Promotion of the Finished Project (can be submitted electronically)
- High-Definition Copy of the Finished Production



EXHIBIT A

DECLARATION OF RESIDENCY IN CANADIAN, CLEVELAND, GRADY, LINCOLN, LOGAN, McCLAIN AND OKLAHOMA COUNTIES, and OKLAHOMA CITY RESIDENTS RESIDING IN POTTAWATOMIE COUNTY

PLEASE DO NOT SUBMIT THIS FORM WITH YOUR OKLAHOMA CITY FILM INCENTIVE APPLICATION

****Please fill out one declaration of residency per each local hire****

Motion picture production companies claiming a tax credit based on wages or salaries paid to residents of Canadian, Cleveland, Grady, Lincoln, Logan, McClain and Oklahoma County, and any Oklahoma City residents residing in Pottawatomie County for work performed on an Oklahoma City Economic Development Trust-certified production must have each employee complete this declaration of residency. The film production company must retain this form in its records and provide it when requested.

Name:

Social Security Number:

Permanent Residence - Physical Address:

City/State/ZIP/Country:

Phone Number:

ID# & Title of Film Project:

Position on the Production:

1. Is your primary residence located in Canadian, Cleveland, Grady, Lincoln, Logan, McClain, Oklahoma, or portions of Oklahoma City located in Pottawatomie County in the state of Oklahoma? YES or NO

2. Have you lived at this residence more than 6 months from the date of hire? YES or NO

3. What evidence have you provided the film production company to show residence**? **You must provide at least one of the following. This proof of residence must be attached with this form.**

***A resident is defined as one having their main residence in Canadian, Cleveland, Grady, Lincoln, Logan, McClain, or Oklahoma City County. Minimum residency is 6 months prior to the date of hire and resident must possess either a valid Oklahoma driver's license, ITN, or utility bill with name and address.*

I declare under penalty of perjury (which if this document is falsified, may result in criminal and/or civil penalties) that I am a true resident as described.

A valid Oklahoma driver's license. Enter the driver's license number:

A current Oklahoma voter registration. Enter the registering county:

A copy of last year's Federal and/or Oklahoma personal income tax return:

A copy of Utility Bill listing local home address. No P.O. Boxes.

Individual Taxpayer Identification Number (ITN) issued by the IRS:

Date:

Signature:

CITY OF OKLAHOMA CITY BOUNDARIES Potential Film Locations

