

Name	Identifying Number
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If you qualify for the angel investment credit, complete Part I. If you qualify for the early stage seed investment credit, complete Part II.

Round Amounts to Nearest Dollar

**Part I Angel Investment Credit**

1 Fill in the following information regarding your investments in qualified new business ventures that the Wisconsin Economic Development Corporation has verified as first eligible for a tax credit in 2024 (attach separate schedules if more space is needed):

Date Investment Made	Name of Qualified New Business Venture	Total Investment	Qualified Investment
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1a <u>  </u> / <u>  </u> / <u>  </u> M M D D Y Y Y Y	1a _____	1a _____ .00	1a _____ .00
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1b <u>  </u> / <u>  </u> / <u>  </u> M M D D Y Y Y Y	1b _____	1b _____ .00	1b _____ .00
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1c <u>  </u> / <u>  </u> / <u>  </u> M M D D Y Y Y Y	1c _____	1c _____ .00	1c _____ .00
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1d Total qualified investments (add lines 1a through 1c). **Include WEDC certification** . . . . . **1d** \_\_\_\_\_ .00

2 Multiply the amount on line 1d by 25% (0.25) . . . . . **2** \_\_\_\_\_ .00

3 Fill in the 2024 angel investment credit passed through from angel investment networks:

3a Entity Name \_\_\_\_\_  
 FEIN \_\_\_\_\_ Amount 3a \_\_\_\_\_ .00

3b Entity Name \_\_\_\_\_  
 FEIN \_\_\_\_\_ Amount 3b \_\_\_\_\_ .00

3c Total pass through credits from additional schedule . . . **3c** \_\_\_\_\_ .00

3d Total credits (add lines 3a through 3c) . . . . . **3d** \_\_\_\_\_ .00

3e Fill in the amount of credit transferred from other taxpayers in 2024 (from Part IV, page 4). . . . . **3e** \_\_\_\_\_ .00

4 Add lines 2, 3d, and 3e. This is your 2024 credit . . . . . **4** \_\_\_\_\_ .00

5 Carryover of unused angel investment credit (see instructions). **Include Schedule CF** . . . . . **5** \_\_\_\_\_ .00

5a Fill in the amount of credit transferred to other taxpayers in 2024 (from Part IV, page 4). . . . . **5a** \_\_\_\_\_ .00

6 Add lines 4 and 5 and subtract line 5a. This is the available angel investment credit. **Include Schedule CF** if the credit was not used in full. . . . . **6** \_\_\_\_\_ .00



**Part II Early Stage Seed Investment Credit**

7 Fill in the following information regarding your investments paid to a certified fund manager that the Wisconsin Economic Development Corporation has verified as eligible for a tax credit in 2024 (attach separate schedules if more space is needed):

Date Investment Made	Name of Certified Fund Manager	Total Investment	Qualified Investment
7a <u>  </u> <u>  </u> <u>  </u> <u>  </u> <u>  </u> <u>  </u> <u>  </u> <u>  </u>	7a _____	7a _____ .00	7a _____ .00
7b <u>  </u> <u>  </u> <u>  </u> <u>  </u> <u>  </u> <u>  </u> <u>  </u> <u>  </u>	7b _____	7b _____ .00	7b _____ .00
7c <u>  </u> <u>  </u> <u>  </u> <u>  </u> <u>  </u> <u>  </u> <u>  </u> <u>  </u>	7c _____	7c _____ .00	7c _____ .00
7d Total qualified investment (add lines 7a through 7c) <b>Include WEDC certification.</b> . . . . .			7d _____ .00
8 Multiply line 7d by 25% (0.25) or enter the credit specially allocated to you . . . . .			8 _____ .00
9 Fill in the 2024 early stage seed investment credit passed through from other entities:			
9a Entity Name _____			
FEIN _____		Amount 9a _____ .00	
9b Entity Name _____			
FEIN _____		Amount 9b _____ .00	
9c Total pass through credits from additional schedule . . . . .			9c _____ .00
9d Total credits (add lines 9a through 9c) . . . . .			9d _____ .00
10 Fill in the amount of credit transferred from other taxpayers in 2024 (from Part III page 3) . . . . .			10 _____ .00
11 Add lines 8, 9d and 10. This is your 2024 credit (see instructions) . . . . .			11 _____ .00
11a Fiduciaries - enter the amount of credit allocated to beneficiaries . . . . .			11a _____ .00
11b Fiduciaries - subtract line 11a from line 11 . . . . .			11b _____ .00
12 Carryover of unused early stage seed investment credit. <b>Include Schedule CF</b> . . . . .			12 _____ .00
13 Add lines 11 and 12 (lines 11b and 12 if fiduciary) . . . . .			13 _____ .00
14 Fill in the amount of credit transferred to other taxpayers in 2024 . . . . .			14 _____ .00
15 Subtract line 14 from line 13. This is the available early stage seed investment credit. <b>Include Schedule CF</b> if the credit was not used in full . . . . .			15 _____ .00



**Part III Transfer of Early Stage Seed Investment Credit**

**1** Fill in the following information regarding the transfer in 2024 by a person eligible to claim the early stage seed investment credit to a person subject to tax under ch. 71 or subch. III of ch. 76:



**1a** Person Eligible to Claim the Early Stage Seed Investment Credit:

Name		
Number and Street		
City	State	Zip Code

**1b** Recipient of Transferred Early Stage Seed Investment Credit:

Name		Identifying Number
Number and Street		
City	State	Zip Code

**1c** Transferred Amount \_\_\_\_\_ .00 Investment Fund Manager Approval Date                             
 Wisconsin Economic Development Corporation Approval Date                           

**2a** Recipient of Transferred Early Stage Seed Investment Credit:

Name		Identifying Number
Number and Street		
City	State	Zip Code

**2b** Transferred Amount \_\_\_\_\_ .00 Investment Fund Manager Approval Date                             
 Wisconsin Economic Development Corporation Approval Date                           

**3a** Recipient of Transferred Early Stage Seed Investment Credit:

Name		Identifying Number
Number and Street		
City	State	Zip Code

**3b** Transferred Amount \_\_\_\_\_ .00 Investment Fund Manager Approval Date                             
 Wisconsin Economic Development Corporation Approval Date

**Part IV Transfer of Angel Investment Credit**

**1** Fill in the following information regarding the transfer in 2024 by a person eligible to claim the angel investment credit to a person subject to tax under ch. 71:



**1a** Person Eligible to Claim the Angel Investment Credit:

Name		
Number and Street		
City	State	Zip Code

**1b** Recipient of Transferred Angel Investment Credit:

Name		Identifying Number
Number and Street		
City	State	Zip Code

**1c** Transferred Amount \_\_\_\_\_ .00

Wisconsin Economic Development Corporation Notification Date                        

**2a** Recipient of Transferred Angel Investment Credit:

Name		Identifying Number
Number and Street		
City	State	Zip Code

**2b** Transferred Amount \_\_\_\_\_ .00

Wisconsin Economic Development Corporation Notification Date                        

**3a** Recipient of Transferred Angel Investment Credit:

Name		Identifying Number
Number and Street		
City	State	Zip Code

**3b** Transferred Amount \_\_\_\_\_ .00

Wisconsin Economic Development Corporation Notification Date