

# ITC ADVISORY SERVICES

**United Fund Advisors (UFA) is a fund manager and financial services company that provides tax-advantaged investment capital and advisory services for renewable energy and community development projects throughout the country.**

With over \$400 million of assets under management, all of UFA's projects are driven by its triple bottom line mission "to create opportunities for profitable investments which enhance social and environmental yields." UFA is an industry leader in renewable energy Investment Tax Credit (ITC) and New Markets Tax Credit (NMTC) financings. Leveraging its ITC and other tax credit investment experience, UFA provides a broad range of ITC advisory services to renewable energy developers, manufacturers, and governmental organizations. In addition, UFA's advisory services include project sourcing, structuring, negotiations, and asset management for tax equity investors. UFA has financed solar, wind, and fuel cell projects in Washington, Oregon, California, and Hawaii with over \$100 million in project costs.

"We often engage United Fund Advisors on ITC transactions to structure the financing and to assist the project sponsors in understanding how tax credit financing works. UFA has significant renewable energy industry expertise that enables it to get complicated projects financed."

— Darren Van't Hof, Director of Renewable Energy Tax Credit Investments  
U.S. Bancorp Community Development Corporation, a wholly owned subsidiary of U.S. Bank

"With its ingenuity and deep understanding of the tax credit equity market, UFA enabled our project to finally receive all of its necessary funding. Thanks to UFA, we will now be able to provide a source of clean energy for the City of San Diego and UCSD."

— Ken Frisbie, Managing Director  
BioFuels Energy, LLC

## Sourcing, Structuring, Closing, and Managing ITC Investments

On behalf of renewable energy developers, manufacturers, investors, and governmental organizations, UFA provides advisory services in connection with securing, structuring, closing, and managing ITC financings, including:

- Sourcing ITC investments;
- Sourcing ITC equity and debt;
- Structuring, negotiating, and closing ITC investments including generation of financial models, finalization of term sheets and related agreements, oversight of fund flows, and management of the entire financing closing team; and
- Analyzing and managing compliance and asset management risk.

## Contacting Us

Please contact one of our Principals directly to see how UFA can serve as your organization's experienced ITC partner. Visit our website to learn more about our services and proven track record in renewable energy financing.

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