



WISCONSIN  
HISTORICAL  
SOCIETY

HISTORIC HOMEOWNER'S INCOME TAX CREDIT APPLICATION

**PART 1 – EVALUATION OF SIGNIFICANCE**

1. **PROPERTY ADDRESS** Street 2721 N. Lake Drive  
City Milwaukee County Milwaukee ZIP 53211

Listed individually in the State Register or National Register. COMPLETE THIS PAGE ONLY

LISTING NAME \_\_\_\_\_

Located in a State Register or National Register historic district. COMPLETE THIS PAGE ONLY

NAME OF HISTORIC DISTRICT North Point North Historic District

**PRELIMINARY CERTIFICATION** Not listed in State Register or National Register or located in a State Register or National Register historic district - COMPLETE BOTH PAGES

2. **OWNER'S NAME** Ann Jacobs & Bradly Brunson

Street 2719 N Farwell Ave

City Milwaukee State WI ZIP 53211 Telephone (days) 414 / 736-5001


Email address Ann@JacobsInjuryLaw.com

3. **PROJECT CONTACT** Ann Jacobs

Email address Ann@JacobsInjuryLaw.com Telephone (days) 414 / 736-5001

4. **PHOTOGRAPHS** Please enclose photographs of the exterior of the building to be rehabilitated. Photos should be in color, at least 4" x 6", commercially printed and clearly show all sides of the building.

5. **OWNER'S CERTIFICATION** I hereby attest that the information I have provided is, to the best of my knowledge, correct and that I own the property described above. I understand that the falsification of factual representations in the application may be subject to criminal sanctions.

SIGNATURE OF OWNER  DATE 9/23/21

SEND COMPLETED APPLICATIONS TO State Historic Preservation Office  
Wisconsin Historical Society – Room 312  
816 State Street, Madison, WI 53706

**STATE HISTORIC PRESERVATION OFFICE USE ONLY**

WHS PROJECT NO. \_\_\_\_\_

The State Historic Preservation Office has reviewed this application and has determined that:

- the property is listed in the State Register of Historic Places or National Register of Historic Places and is historic property for purposes of the Historic Homeowner's Income Tax Credit.
- the property contributes to the above-named State Register or National Register historic district and is historic property for purposes of the Historic Homeowner's Income Tax Credit.
- the property appears to meet the State Register or National Register Criteria for Evaluation and, therefore is determined to be historic property for purposes of the Historic Homeowner's Income Tax Credit.
- NON-CERTIFICATION: the property is not listed in the State Register of Historic Places or National Register of Historic Places, is not a contributing element to a State Register historic district or National Register historic district, and does not appear to meet the State Register or National Register Criteria for Evaluation; therefore, the property is not a historic property for purposes of the Historic Homeowner's Income Tax Credit.

For Daina Penklunas, State Historic Preservation Officer

Date



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**PART 1 – EVALUATION OF SIGNIFICANCE**

Property Address 2721 N. Lake Drive, Milwaukee, WI 53211

**INSTRUCTIONS** Complete this page of the form **ONLY** if you are applying for PRELIMINARY CERTIFICATION. Enclose photographs of all sides of the building's exterior, and interior spaces. Also include photographs of the site and any outbuildings (such as garages, barns, or other agricultural buildings). The photographs should clearly illustrate the appearance of the property and its significant features.

**6. BUILDING DATA**

Date of construction \_\_\_\_\_ Source of date \_\_\_\_\_

Dates (or approximate dates) and brief description of alterations \_\_\_\_\_

Has the building been moved?  Yes  No

If yes, when and from where? \_\_\_\_\_

**7. DESCRIBE WHY THE PROPERTY IS IMPORTANT**



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**PART 2 – DESCRIPTION OF PROPOSED WORK**

1. **PROPERTY ADDRESS** Street 2721 N. Lake Drive  
City Milwaukee County Milwaukee ZIP 53211

2. **OWNER'S NAME** Ann Jacobs & Brad Brunson  
Street 2719 N Farwell Ave  
City Milwaukee State WI ZIP 53211 Telephone (days) 414 / 736-5001  
Email address Ann@JacobsInjuryLaw.com

3. **PROJECT CONTACT** Ann Jacobs  
Email address Ann@JacobsInjuryLaw.com Telephone (days) 414 / 736-5001

4. **OWNER'S CERTIFICATION** I hereby attest that the information I have provided is, to the best of my knowledge, correct and that I own the property described above. I understand that the falsification of factual representations in the application may be subject to criminal sanctions. I further agree to submit the *Request for Certification of Completed Work* within 30 days of the date of completion of work or face forfeiture of any tax credit claimed for this project.

SIGNATURE OF OWNER  DATE 9/23/21

SEND COMPLETED APPLICATIONS TO State Historic Preservation Office  
Wisconsin Historical Society – Room 312  
816 State Street, Madison, WI 53706

<b>STATE HISTORIC PRESERVATION OFFICE USE ONLY</b>		<b>WHS PROJECT NO.</b> _____
The State Historic Preservation Office has reviewed this application for the above name property and has determined that:		
___	the property is historic property and the rehabilitation as described meets the "Secretary of the Interior's Standards for Rehabilitation." This is a preliminary determination only. Final certification can be issued only after work has been completed and a Request for Certification of Completed Work has been approved.	
___	the property is historic property and the rehabilitation will meet the "Secretary of the Interior's Standards for Rehabilitation" if the attached conditions are met. This is a preliminary determination only. Final certification can be issued only after work has been completed and a Request for Certification of Completed Work has been approved.	
_____	For Daina Penkiunas, State Historic Preservation Officer	_____ Date
<b>NON-CERTIFICATION</b>		
___	THE OWNER MAY NOT CLAIM THE TAX CREDIT. The rehabilitation is not consistent with the historic character of the property and that the project does not meet the "Secretary of the Interior's Standards for Rehabilitation" for reasons given in the attached materials.	
___	THE OWNER MAY NOT CLAIM THE TAX CREDIT. The property has not been determined to be historic property for purposes of this program.	
_____	For Daina Penkiunas, State Historic Preservation Officer	_____ Date



HISTORIC HOMEOWNER'S INCOME TAX CREDIT APPLICATION  
**PART 2 – DESCRIPTION OF PROPOSED WORK**

**5a. TAX CREDIT-ELIGIBLE WORK**

Below is a list of common eligible work items. If you have a work item that is not on the list, please add it. Select the work for which you plan to claim the 25% tax credit.

Eligible Work	Specific Type				Estimated Cost	Start Date	Completion Date
<input checked="" type="checkbox"/> Doors	<input type="checkbox"/> Repair	<input type="checkbox"/> Replace	<input checked="" type="checkbox"/> Front/Rear	<input type="checkbox"/> Garage	\$ 5,000	11/1/21	12/1/21
<input checked="" type="checkbox"/> Chimney	<input checked="" type="checkbox"/> Repair	<input type="checkbox"/> Replace	<input type="checkbox"/> Chimney Cap	<input type="checkbox"/> Liner/Insert	\$ 18,845	9/1/22	11/1/22
<input type="checkbox"/> Electrical	<input type="checkbox"/> Repair	<input type="checkbox"/> Update	<input type="checkbox"/> New Service	<input type="checkbox"/> Wall Repair	\$		
<input type="checkbox"/> Foundation	<input type="checkbox"/> Repair	<input type="checkbox"/> Rebuild	<input type="checkbox"/> Waterproofing	<input type="checkbox"/> Drain Tile	\$		
<input type="checkbox"/> HVAC	<input type="checkbox"/> Boiler	<input type="checkbox"/> Furnace	<input type="checkbox"/> Water Heater	<input type="checkbox"/> AC	\$		
<input checked="" type="checkbox"/> Masonry	<input type="checkbox"/> 100%	<input checked="" type="checkbox"/> Partial			\$ 18,000	10/15/21	11/15/21
<input type="checkbox"/> Painting	<input type="checkbox"/> House	<input type="checkbox"/> Trim	<input type="checkbox"/> Garage	<input type="checkbox"/> Outbuilding	\$		
<input type="checkbox"/> Plumbing	<input type="checkbox"/> Repair	<input type="checkbox"/> Update	<input type="checkbox"/> New Service	<input type="checkbox"/> Wall Repair	\$		
<input type="checkbox"/> Porch	<input type="checkbox"/> Repair	<input type="checkbox"/> Replace	<input type="checkbox"/> New	<input type="checkbox"/> Steps	\$		
<input type="checkbox"/> Roof	<input type="checkbox"/> Repair	<input type="checkbox"/> Replace	<input type="checkbox"/> Shingles	<input type="checkbox"/> Sheathing	\$		
	<input type="checkbox"/> Gutters	<input type="checkbox"/> Downspouts	<input type="checkbox"/> Soffits	<input type="checkbox"/> Fascia	\$		
<input type="checkbox"/> Siding	<input type="checkbox"/> Repair	<input type="checkbox"/> Replace	<input type="checkbox"/> Remove artificial		\$		
<input type="checkbox"/> Structural	<input type="checkbox"/> Columns	<input type="checkbox"/> Beams	<input type="checkbox"/> Joists	<input type="checkbox"/> Trusses	\$		
<input type="checkbox"/> Utilities	<input type="checkbox"/> Solar Panels	<input type="checkbox"/> Geo-thermal	<input type="checkbox"/> Well/Septic		\$		
<input type="checkbox"/> Windows	<input type="checkbox"/> Repair	<input type="checkbox"/> Replace	<input type="checkbox"/> Storm Windows	<input type="checkbox"/> Skylights	\$		
<input type="checkbox"/> Other					\$		
<input type="checkbox"/> Other					\$		
<b>TOTAL COST</b>					<b>\$ 41,845</b>		

**5b. INELIGIBLE WORK**

Below is a list of common ineligible work items. If you have a work item that is not on the list, please add it. ALL WORK MUST BE REVIEWED REGARDLESS OF ELIGIBILITY. Include work completed within the last year.

Ineligible Work	Specific Type				Estimated Cost	Start Date	Completion Date
<input checked="" type="checkbox"/> Driveway	<input checked="" type="checkbox"/> Repair	<input type="checkbox"/> New			\$ TBD	2022	2022
<input checked="" type="checkbox"/> Fixtures	<input checked="" type="checkbox"/> Lighting	<input checked="" type="checkbox"/> Plumbing			\$ 4,000	9/2021	10/2021
<input type="checkbox"/> Insulation	<input type="checkbox"/> Wall	<input type="checkbox"/> Attic			\$		
<input checked="" type="checkbox"/> Interior	<input type="checkbox"/> Refinish	<input checked="" type="checkbox"/> Plaster Repair	<input checked="" type="checkbox"/> Paint		\$ 10,000	9/2021	10/2021
<input checked="" type="checkbox"/> Landscaping	<input checked="" type="checkbox"/> Patio	<input checked="" type="checkbox"/> Fencing	<input type="checkbox"/> Sidewalks		\$ 25,000	9/2021	2022
<input type="checkbox"/> New	<input type="checkbox"/> New Addition				\$		
<input checked="" type="checkbox"/> Remodeling	<input checked="" type="checkbox"/> Kitchen	<input checked="" type="checkbox"/> Bath	<input type="checkbox"/> Attic	<input type="checkbox"/> Basement	\$ 100,000	2022	2023
<input checked="" type="checkbox"/> Other	Restore historic carpentry (removed by previous owners)				\$ 50,000	2021	2022
<input type="checkbox"/> Other					\$		
<input type="checkbox"/> Other					\$		
<b>TOTAL COST</b>					<b>\$</b>		



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**PART 2 – ADDITIONAL REQUIRED INFORMATION**

**6. PHOTOGRAPHS**

Enclose clear color photographs of the pre-project conditions of all items listed.

**7. ADDITIONAL PROJECT INFORMATION**

Describe your project and the materials and methods you propose using on the next page. Submit architect/contractor drawings if applicable. Submit a copy of all contractor estimates. See the chart below for other types of information required.

<b>Proposed Work</b>	<b>Additional Information Required</b>
Construct Deck	Submit drawings showing location, design, materials and finish.
Fencing	Submit manufacturer literature showing location, design, materials and finish.
Doors (exterior)	Submit manufacturer literature showing design, materials and finish.
Insulation	Describe insulation type and installation method.
Masonry Pointing	Submit photos of areas requiring pointing.
Mini-Split System	Show locations of vertical piping and wall units.
New Construction	Submit drawings showing location, design, materials and finish.
Porch	Submit photo of original and drawings showing location, design, materials and finish.
Remodeling	Submit drawings showing existing and proposed interior design.
Replace Roof	Submit specific shingle manufacturer, shingle name and shingle color.
Replace Windows	Submit detailed photos of existing window deterioration (int & ext) & new window information
Storm Windows	Submit manufacturer literature showing design, materials and finish.
Structural	Submit written description of the proposed work and location.



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**PART 2 – DESCRIPTION OF PROPOSED WORK**

**7. INSTRUCTIONS** Describe each item of your project and the materials and methods you propose

**Masonry:**

**Portico:**

- Tuckpoint throughout
- Replace bricks where necessary - will match as closely as possible
- Repair rubber membrane above portico to prevent additional water intrusion, address any gutter problems with drainage from roof of portico
- Remove plastic beadboard from underside of portico. Repair/replace original wood ceiling.

**House:**

- Tuckpoint throughout
- Brick repair - particularly to north and west sides
- Remove failing caulk around decorative windows and replace to prevent additional water intrusion
- Repair decorative concrete - esp around windows and on Juliet balconies
- Gently power wash house to remove vines

**Fireplace:**

- Restore all three fireplaces to natural wood burning
- Rebuild all 3 firebox walls using new brick laid in high temp cement
- Resurface entire smoke chamber using Smoke Tite repair
- Resurface entire flue using Heat shield repair mix

**Front Door:**

- Custom made wood screen door
- Custom made wood storm door  
(currently there is no storm door of any kind)

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**REQUEST FOR FIVE YEAR PROJECT PHASING**

**INSTRUCTIONS** If you wish to claim rehabilitation expenses beyond the standard two-year period, you must complete this form and submit it along with the Part 2 application. Make sure that you have listed all of the work in the Part 2 application, then break down the work into annual phases.

**1. PROPERTY ADDRESS**

Street 2721 N. Lake Drive

City Milwaukee

County Milwaukee

ZIP 53211

Work to be performed in **YEAR 1**  
Calendar Year 2021

Masonry work should be completed in 2021 into 2022.  
Interior paint, basic electrical, some landscaping will be/has been completed in 2021.

Work to be performed in **YEAR 2**  
Calendar Year 2022

Fireplace repair/restore. However, this may need to be in 2023 as it will require extensive scaffolding to avoid damaging the tile roof.  
New front storm/screen door(s). Interior restoration of original wood trim. Begin kitchen remodel.

Work to be performed in **YEAR 3**  
Calendar Year 2023

Fireplace repair/restore if not completed in 2022. Replace deteriorating driveway. Replace front porch (requires historic approval). Replace back fence.  
Complete kitchen remodel if not completed in 2022.

Work to be performed in **YEAR 4**  
Calendar Year \_\_\_\_\_

Work to be performed in **YEAR 5**  
Calendar Year \_\_\_\_\_

**OWNER'S CERTIFICATION**

I hereby apply for five-year phasing for the above-stated project.

SIGNATURE OF OWNER

DATE: 9/23/21

**STATE HISTORIC PRESERVATION OFFICE USE ONLY**  
I hereby approve the phasing plan for this project

WHS PROJECT NO. \_\_\_\_\_

\_\_\_\_\_  
For Daina Penkiunas, State Historic Preservation Officer

\_\_\_\_\_  
Date