

**NOTICE OF TENDER OFFER ACCEPTANCE**  
**RELATING TO THE**  
**OFFER TO PURCHASE BONDS, DATED SEPTEMBER 23, 2024,**  
**made by**

**OHIO WATER DEVELOPMENT AUTHORITY**

**to the Holders described herein of all of the maturities listed on the following page of**  
**State of Ohio**  
**Water Pollution Control Loan Fund**  
**Series 2017A**

**CUSIPs: 67766WXU1, 67766WXV9, 67766WXY3, 67766WXW7, 67766WXX5**

This Notice of Tender Offer Acceptance, dated October 1, 2024 (the “Notice”), provides a final determination with respect to a portion of the Target Bonds, as described herein, that the Ohio Water Development Authority (the “Authority”) will purchase pursuant to the Offer to Purchase Bonds, dated September 23, 2024 (as amended to date, the “Offer”) made by the Authority. All other terms relating to the Offer remain unchanged; terms used herein and not otherwise defined are used as defined in the Offer.

Pursuant to the Offer, including the Authority’s Preliminary Official Statement for its State of Ohio Water Pollution Control Loan Fund Refunding Revenue Bonds, Series 2024E, dated September 23, 2024 (the “Series 2024E Bonds”), incorporated therein by reference, the Authority invited the holders of the Target Bonds to offer to sell their Target Bonds to the Authority for cash, subject to the terms of the Offer. Set forth below in Table I are the amounts tendered (as reported by the Tender Agent) of the Target Bonds that are hereby accepted by the Authority (as determined by the Authority). All of the Target Bonds listed in Table I of this Notice, that have been accepted for purchase by the Authority are expected to be settled on the Settlement Date of October 15, 2024. Notwithstanding the foregoing, this acceptance is subject to all conditions contained in the Offer including that the Authority will have no obligation to purchase Target Bonds tendered and listed in Table I if cancellation or modification occurs or if the Authority is unable to issue any of the Series 2024E Bonds.

Notional tendered is as reported by the Tender Agent.

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TABLE I

The table below provides the Target Bonds that have been *accepted* for purchase by the Authority.

**TARGET BONDS ACCEPTED FOR PURCHASE**

**Ohio Water Development Authority  
State of Ohio  
Water Pollution Control Loan Fund Revenue Bonds  
Series 2017A**

<u>Maturity Date</u>	<u>Principal Amount Tendered</u>	<u>Interest Rate</u>	<u>CUSIP<sup>(1)</sup> No. (67766W)</u>	<u>Optional Redemption Date</u>
06/1/2029	\$21,515,000	5.000%	XU1	June 1, 2027
12/1/2029	12,165,000	5.000	XV9	June 1, 2027
06/1/2030	27,425,000	5.000	XY3	June 1, 2027
12/1/2030	25,950,000	5.000	XW7	June 1, 2027
12/1/2031	44,000,000	5.000	XX5	June 1, 2027

<sup>(1)</sup> CUSIP® is a registered trademark of the American Bankers Association. CUSIP data herein are provided by CUSIP Global Services, managed by FactSet Research Systems Inc. on behalf of the American Bankers Association. CUSIP numbers have been assigned by an independent company and are included solely for the convenience of the holders of the Target Bonds. None of the District, the Dealer Manager and Tender Agent or their agents or counsel assume responsibility for the accuracy of such numbers.

***The Dealer Manager for the Tender Offer is:***

**RBC Capital Markets, LLC**

Brookfield Place

200 Vesey Street, 8<sup>th</sup> Fl

New York, New York 10281

Attn: Liability Management Team

Toll Free: (877) 381-2099

Phone: (212) 618-7843

Email: liability.management@rbccm.com

***The Information Agent and Tender Agent for the Tender Offer is:***

**Globic Advisors**

485 Madison Avenue, 7<sup>th</sup> Floor

New York, New York 10022

Tel: (212) 227-9622

Attn: Robert Stevens

Email: rstevens@globic.com

Document Website: <https://www.globic.com/owda>

October 1, 2024