**Energy Project Application**

| **Company Information** | | | | | | |
| --- | --- | --- | --- | --- | --- | --- |
| Owner Name: | | | | | | |
| Business Mailing Address: (*if different than property address*) | | | | | | |
| Type of Business: | Corporation | | S Corporation | | | S Corporation |
|  | LLC | | Partnership | | | Sole Proprietor |
| Owner EIN: | | | [NAICS/SIC Code](http://www.naics.com/search/): | | | |
| **Building Information** | | | | | | |
| Property Address: | | | | | | |
| Building Name: | | | | | | |
| Property Parcel No: | | Area (sq. ft.): | | | Year Built: | |
| List any related ownership partners/subsidiaries/proprietors: | | | | | | |
| Building Property Insurance Company: | | | | | | |
| Type of Business: | | | | | | |
| When was the property acquired by the current owners? | | | | | | |
| When was the building built? | | | | | | |
| Has there been a major renovation? | | | | Yes  No | | |
| Other than the proposed project, are there any other major capital expenditures (greater than $25,000) planned for the next five years? If so, please describe. | | | | | | |

| **Energy Project Information** | | | | | |
| --- | --- | --- | --- | --- | --- |
| Name of company that completed energy assessment: | | | | | |
| Date completed: | | | | | |
| Projected annual energy savings: | ccf:  kWh: | | Projected annual energy cost savings: | $ | |
| Please include a copy of the energy audit as an attachment to this application. | | | | | |
| Please provide the proposed scope of work for this project. The project work scope should include projected energy savings or energy generation estimates from an approved contractor. | | | | | |
| Have you engaged contractors, engineers/architects/ or equipment vendors? If so, please list: | | | | | |
| Estimated construction start date: | |  | Estimated construction end date: | |  |
| Estimated project cost: | $ | | Requested financing amount: | $ | |
| Please attach a list of other sources of funds that will be used to finance the project and the date they will be available. | | | | | |

**Financial Information**

| **Taxes and Assessments** | | |
| --- | --- | --- |
|  | Amount of property taxes and other municipal assessments (e.g. sewer assessment) paid on the property for the most recent year. | **$** |
|  | Are payments current? | Yes  No |
|  | Are all other municipal assessment payments current? | Yes  No |
|  | Do you have clear title to the property with no encumbrances? | Yes  No |
|  | Are there any outstanding tax liens or notices of default? | Yes  No |
|  | If the answer to any of the above question was no, please explain. | |

| **Appraisal** |
| --- |
| |  |  | | --- | --- | | What is the most recent market value appraisal? |  | | When was the appraisal conducted? |  | | For whom was the appraisal done? |  | | Please submit a copy of the most recent appraisal. |  | |
| **Mortgage** |
| |  |  | | --- | --- | | Is the building subject to a mortgage or other secured interest? | Yes  No | | If yes, note all mortgage holder(s) |  | | What are the major repayment terms? |  | | Principal outstanding: |  | | Interest rate (fixed or variable): |  | | Term & Amortization schedule: |  | | Are mortgage payments current? | Yes  No | | Has any foreclosure filing been commenced on the property within the last five years? | Yes  No | |
| **Lease** |
| |  |  | | --- | --- | | Does the building have tenant/sub-leases or is it leased to another entity? | Yes  No | | What has been the vacancy rate of the property over the last 5 years? | | | How would you characterize the stability of the lessees? | | | Please attach a table listing all tenants, their monthly (or annual) lease payments, the percentage of the building they occupy, and the end date of their existing leases. | | |

| **Financial Statements** | |
| --- | --- |
| |  | | --- | | NOTE: Financial statements should adequately disclose financial condition and be prepared according to generally accepted accounting principles in the United States (US GAAP) that afford a reasonable basis for reliance on the information provided. | | Please provide company historical audited financial statements from the most recent three year period  (balance sheet, P&L, and cash flow structure). Also attach P&L statement for the next three year period. | | Please provide Interim Financial Statement (not more than 90 days old). | | Please provide proof of insurance for the property. | | |
| **Solar Applications** | |
| |  | | --- | | Please append previous year federal tax returns if property is planning to claim value of the federal Investment Tax Credit or MACRS depreciation benefits in determining the project’s overall savings for purposes of calculating the Savings to Investment Ratio. These should be appended to the form “Documentation of Ability to Monetize Federal Tax Credits Associated with Clean Energy Installations.” | | |
| **Mortgage Holder Consent** | |
| Please provide a signed Lender Consent to Benefit Assessment form. |  |
| **Attachments** | |
| Energy audit | |
| Proposed scope of work | |
| Appraisal | |
| Lease data (if applicable) | |
| Historical financial statements | |
| Projected financial statements | |
| Interim financial statements | |
| List of creditors and outstanding obligation for each | |
| Detailed sources and uses of funding for project | |
| Signed Lender Consent form | |
| Two years of utility data | |
| Photograph of property | |

**Disclosure Statement**

Please thoroughly read and sign the following:

1. The Applicant authorizes the ENERGIZE KENTUCKY or other Program underwriting partners to make inquiries as necessary to verify the accuracy of the statements made and to determine the Applicant’s creditworthiness (including, but not limited to, regular and investigative reports, credit reports, financial statements, and other documents submitted by Applicant in connection with this application). The statements made herein are made for the purpose of either obtaining a loan or guaranteeing a loan. By signing below, Applicant understands that false statements may result in forfeiture of benefits and possible prosecution.
2. Applicant understands that this completed and signed application is only an application and does not constitute a commitment on part of ENERGIZE KENTUCKY to extend credit.
3. The Applicant agrees to comply with Federal and State laws which prohibit discrimination based on race, color, sex culture, social origin, sexual orientation, condition, or political or religious ideas.
4. The Applicant agrees to notify ENERGIZE KENTUCKY immediately in writing if any of the information contained in this application becomes inaccurate or misleading in any respect.
5. As a condition of considering the application and at any time once the loan is approved, ENERGIZE KENTUCKY and their agents are granted the right to inspect the business facilities.
6. If the project funding is approved, ENERGIZE KENTUCKY may use photographs of facilities in Annual Report, presentations, website, or other materials.

All information in this application and the attached exhibits is true and complete to the best of my knowledge and is submitted for review by ENERGIZE KENTUCKY to extend financing to the business.

| **Applicant Signature:** | **Date:** | |
| --- | --- | --- |
| **Applicant Name:** | **Applicant is:** | Owner of the property  Authorized agent of the Owner |