



## Louisville Energy Project Assessment District (EPAD) FORMAL PROGRAM APPLICATION

Please complete the following information and return this form to the Louisville Metro Office of Advanced Planning and Sustainability at [sustainability@louisvilleky.gov](mailto:sustainability@louisvilleky.gov). If you have already completed the *Initial Eligibility Form*, please make sure that all information submitted on the *Initial Eligibility Form* is still correct and attach an updated version to this document with the final submission.

### **General Information** (If you submitted the *Initial Eligibility Form*, you do not need to complete this section)

Property Owner Contact:		Position:
Company:		Email:
Work Phone:		Mobile Phone:
Mailing Address:		
City:	State:	Zip Code:

### **Property Information** (If you submitted the *Initial Eligibility Form*, you do not need to complete this section)

Owner(s) of record of the subject property – If there is more than one legal owner listed on the property, please provide the names, addresses, phone numbers and email addresses of all owners of record as Attachment A.

<b>Owner 1</b>	Name:			
	Mailing Address:			
	City:	State:	Zip Code:	
	Phone:	Email:		
Owner EIN:		<a href="#">NAICS/SIC Code:</a>		
Property Type:	<input type="checkbox"/> Office	<input type="checkbox"/> Multifamily housing	<input type="checkbox"/> Retail	<input type="checkbox"/> Warehouse
	<input type="checkbox"/> Industrial	<input type="checkbox"/> Educational Building	<input type="checkbox"/> Hospital	<input type="checkbox"/> Other:
Are there any residential units on the property?		<input type="checkbox"/> Yes	<input type="checkbox"/> No	If yes, how many?
Building name (if applicable):				
Property Parcel ID(s) as listed with Property Valuation Authority (PVA):				
Property Address:				
County:	Municipality:	State:	Zip Code:	
Square Footage:		Year Built:	Year Purchased:	
Type of Business:				
Ownership Structure:	<input type="checkbox"/> Corporation	<input type="checkbox"/> 501(c)(3) Non-profit	<input type="checkbox"/> Joint tenants	<input type="checkbox"/> Trust
	<input type="checkbox"/> Partnership	<input type="checkbox"/> Limited Liability Corporation	<input type="checkbox"/> Government	<input type="checkbox"/> Other:



List any related ownership partners/subsidiaries/proprietors:

Is the building subject to a mortgage or secured interest? <input type="checkbox"/> Yes <input type="checkbox"/> No	Has the mortgage been securitized? <input type="checkbox"/> Yes <input type="checkbox"/> No
Mortgage holder:	Outstanding principal:
Does the property have any involuntary liens placed on it? <input type="checkbox"/> Yes <input type="checkbox"/> No	Is the property current on all taxes and assessments? <input type="checkbox"/> Yes <input type="checkbox"/> No
Has the property owner, or any corporate parent of the property owner if the property owner is a single-purpose entity, filed for or been subject to bankruptcy protection in the past three years? <input type="checkbox"/> Yes <input type="checkbox"/> No	

**Project Information** (If you submitted the *Initial Eligibility Form*, you do not need to complete this section)

Has an energy audit been completed (audit is optional)? <input type="checkbox"/> Yes <input type="checkbox"/> No	Date audit completed:
Name of company that completed energy audit:	
Please check the energy efficiency improvements that are being considering for EPAD:	
<input type="checkbox"/> Building Envelope	<input type="checkbox"/> Windows or Doors
<input type="checkbox"/> Lighting	<input type="checkbox"/> HVAC Units
<input type="checkbox"/> Controls	<input type="checkbox"/> Elevator Upgrades
<input type="checkbox"/> Solar	<input type="checkbox"/> Other:
Will the expected life of the equipment be at least five (5) years? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Estimated project cost: \$	Requested financing amount: \$

**Appraisal** (If you submitted the *Initial Eligibility Form*, you do not need to complete this section)

Most recent market value appraisal: \$	When was the appraisal conducted?
For whom was the appraisal done?	

**Additional Property Information**

Deed Book and Page of the subject property:

Please provide a full legal description of the property as Attachment B. The full legal description can be found on the current deed for the property on the [County Clerk's website](#).

Building Property Insurance Company:

Has there been a major renovation (greater than \$25,000)?  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.



**Additional Project Information**

Does this project contain an Energy Savings Performance Contract?  Yes  No

If yes, please provide a copy of the signed Energy Savings Performance Contract as [Attachment C](#).

Total projected annual energy savings:	ccf: kWh:	Projected annual energy cost savings:	\$
--	--------------	---------------------------------------	----

Please provide a full project scope and timeline/schedules that include equipment and fixture specifications, and energy and water savings data that shows both baseline and projected savings as [Attachment D: Energy Project Summary](#).

All energy or water improvements will be permanently affixed to the real property or building.  Yes  No

Please provide a list your engaged contractors, engineers, architects and equipment vendors, and their contact information as [Attachment E](#).

Estimated construction start date:	Estimated construction end date:
------------------------------------	----------------------------------

Please provide a project bid signed by the contractor as [Attachment F](#).

Please provide a project budget as [Attachment G](#). Include a list of all funds, including rebates and tax credits, that will be used to finance the project and the date they will be available.

**Lender Information**

Name of Lender:

Name of Lender Contact:	Position Title:
-------------------------	-----------------

Email:	Work Phone:
--------	-------------

Mailing Address:

City:	State:	Zip Code:
-------	--------	-----------

Expected Loan Term (years):

**Financial Information**

**Taxes and Assessments**

Amount of property taxes paid on the property for the most recent year.	\$
---	----

Payments are current.	<input type="checkbox"/> True <input type="checkbox"/> False
-----------------------	--

All other municipal assessment payments are current.	<input type="checkbox"/> True <input type="checkbox"/> False
--	--

You have a clear title to the property with no encumbrances.	<input type="checkbox"/> True <input type="checkbox"/> False
--	--

There are no outstanding tax liens or notices of default on this property.	<input type="checkbox"/> True <input type="checkbox"/> False
--	--



Currently, I am not appealing a property tax assessment.  True  False

If the answer to any of the questions in the "Taxes and Assessments" section were "False," please explain.

Please provide a copy of the most recent property appraisal as Attachment H.

**Mortgage**

Please provide the results of a full title search on this property, including a list of creditors and the outstanding obligations for each as Attachment I. The title search must reveal all recorded mortgage lien holders.

Are mortgage payments current?  Yes  No  N/A

Has any foreclosure filing been commenced on the property within the last five years?  Yes  No

**Mortgage Holder Consent**

Please provide a signed Mortgage Lien Holder Consent form for each existing mortgage lien holder creditor listed in Attachment I. The signed Mortgage Lien Holder Consent forms should be included together as Attachment J.

**Lease**

Does the building have tenant(s)/sub-lessees?  Yes  No  N/A

What has been the vacancy rate of the property over the last 5 years?

How would you characterize the stability of the lessees?

**Photograph(s)**

Please provide 1-3 photographs of each building included in the project as Attachment K.

**Eligibility Certification**

Please attach a signed copy of the Eligibility Certification as Attachment L.

**List of Attachments**

- A. List of Property Owners of Record  Attachment A is not applicable to this application
- B. Legal Description of Property
- C. Energy Savings Performance Contract  Attachment C is not applicable to this application
- D. Energy Project Summary
- E. List of Contractors
- F. Signed Project Bid



G. Project Budget

H. Appraisal

I. Results of Title Search, including List of Creditors and Outstanding Obligations

J. Signed Lender Consent Forms

K. Photograph(s) of Property

L. Eligibility Certification

**Disclosure Statement**

Please thoroughly read and sign the following:

1. The Applicant authorizes the EPAD Program 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 the EPAD Program or other Program underwriting partners to extend credit.
3. The Applicant agrees to comply with Federal, State and local laws which prohibit discrimination based on race, color, sex culture, social origin, sexual orientation, gender identification, condition, or political or religious ideas.
4. The Applicant agrees to notify the EPAD Program 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, the EPAD Program, other Program underwriting partners, and their agents are granted the right to inspect the business facilities.
6. If the project funding is approved, the applicant will participate in annual surveys and EPAD program evaluations, use the U.S. EPA's ENERGY STAR Portfolio Manager to track energy usage of the property, and allow the Louisville Metro Office of Sustainability to access the property's Portfolio Manager account.
7. If the project funding is approved, the EPAD Program may use photographs of facilities in 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 the EPAD Program and other Program underwriting partners to extend financing to the business.

**Property Owner Signature:**

**Date:**

**Property Owner Name:**

**Property Owner Signature:**

**Date:**

**Property Owner Name:**

**Please include the signature, date, and printed name of all additional owners.**

**Contact Us**

Office of Advanced Planning and Sustainability, [sustainability@louisvilleky.gov](mailto:sustainability@louisvilleky.gov), 502-574-6285