

AMOUNT REQUESTED		TYPE OF PROJECT			
\$		<input type="checkbox"/> EXISTING BUILDING		<input type="checkbox"/> NEW CONSTRUCTION/MAJOR RENOVATION	
<b>PROPERTY OWNER INFORMATION</b>					
LEGAL OWNER			TYPE OF ENTITY		
PROPERTY STREET ADDRESS			CITY	STATE	ZIP CODE
PRIMARY CONTACT NAME			RELATIONSHIP TO OWNER / PROPERTY		
MAILING ADDRESS			CITY	STATE	ZIP CODE
PHONE	EMAIL		WEBSITE		
<b>ELIGIBILITY</b>					
<b>PROPERTY ELIGIBILITY</b>					
IS THE PROPERTY LOCATED IN MULTNOMAH COUNTY?				<input type="checkbox"/> YES	<input type="checkbox"/> NO
TYPE OF PROPERTY?		<input type="checkbox"/> COMMERCIAL	<input type="checkbox"/> INDUSTRIAL	<input type="checkbox"/> MULTI-FAMILY (5+ UNITS)	
ARE ALL REAL PROPERTY TAXES, MUNICIPAL ASSESSMENTS, MORTGAGES AND OTHER LIENS AGAINST THE PROPERTY CURRENT?				<input type="checkbox"/> YES	<input type="checkbox"/> NO
ARE THERE ANY INVOLUNTARY LIENS OR JUDGEMENTS FILED AGAINST THE PROPERTY?				<input type="checkbox"/> YES	<input type="checkbox"/> NO
<b>APPLICANT ELIGIBILITY</b>					
IS THE APPLICANT THE LEGAL OWNER OF THE PROPERTY?				<input type="checkbox"/> YES	<input type="checkbox"/> NO
IS THE OWNER IN GOOD STANDING ON ALL DEBT OWED TO MULTNOMAH COUNTY?				<input type="checkbox"/> YES	<input type="checkbox"/> NO
IS THE OWNER CURRENT ON ALL OUTSTANDING MORTGAGES, WHETHER OR NOT SECURED BY THE PROPERTY?				<input type="checkbox"/> YES	<input type="checkbox"/> NO
IS THE OWNER CURRENTLY IN, OR FILED FOR, BANKRUPTCY IN THE PAST THREE YEARS?				<input type="checkbox"/> YES	<input type="checkbox"/> NO
<b>UTILITY INFORMATION</b>					
WHAT WAS THE ENERGY CONSUMPTION/COST FOR THE PAST 12 MONTHS?					
ELECTRICAL USAGE (#/\$)		NATURAL GAS USAGE (#/\$)		WATER USAGE (#/\$)	
KWH	\$	THERMS	\$	GALLONS	\$

## VALUE/ENCUMBRANCES

IS THE PROPERTY MORTGAGED?	<input type="checkbox"/> YES <input type="checkbox"/> NO	ESTIMATED VALUE	\$ _____
LENDER NAME (1)	LOAN BALANCE \$ _____	LENDER NAME (2)	LOAN BALANCE \$ _____

## PROPERTY INFORMATION

YEAR BUILT _____	GROSS SQUARE FOOTAGE _____
LOT SIZE _____	COMMON AREA SQUARE FOOTAGE _____
# OF BUILDINGS _____	NET LEASABLE SQUARE FOOTAGE _____
OCCUPANCY <input type="checkbox"/> OWNER <input type="checkbox"/> TENANT <input type="checkbox"/> BOTH	# OF TENANTS _____

**USE OF PROPERTY (CHECK ALL THAT APPLY)**

<u>COMMERCIAL</u>	<u>INDUSTRIAL</u>	<u>MULTI-FAMILY (5+ UNITS)</u>
<input type="checkbox"/> OFFICE	<input type="checkbox"/> WAREHOUSE	<input type="checkbox"/> RESIDENTIAL, RENTAL
<input type="checkbox"/> GENERAL RETAIL	<input type="checkbox"/> LIGHT MANUFACTURING	<input type="checkbox"/> RESIDENTIAL, CONDO/OWNERSHIP
<input type="checkbox"/> STRIP CENTER	<input type="checkbox"/> HEAVY MANUFACTURING	<input type="checkbox"/> HOTEL / HOSPITALITY
<input type="checkbox"/> SHOPPING MALL	<input type="checkbox"/> REFRIGERATION/COLD STORAGE	<input type="checkbox"/> ASSISTED LIVING
<input type="checkbox"/> ENTERTAINMENT	<input type="checkbox"/> TELECOMMUNICATION/DATA CENTER	<input type="checkbox"/> OTHER _____
<input type="checkbox"/> FOOD SERVICE / RESTAURANT	<input type="checkbox"/> OTHER _____	# OF UNITS/KEYS _____
<input type="checkbox"/> OTHER _____		INCOME RESTRICTED? <input type="checkbox"/> Yes <input type="checkbox"/> No

## PROJECT DETAILS

THE PROJECT IS (CHOOSE ONE)  A STANDALONE PROJECT  INCORPORATED INTO A LARGER BUILDING UPGRADE

WHAT TYPE OF PROJECT(S) IS PLANNED?  ENERGY EFFICIENCY  RENEWABLE ENERGY/STORAGE  ELECTRIC VEHICLE CHARGING STATIONS  WATER CONSERVATION  SEISMIC

HAS A BUILDING AUDIT OR ENGINEERING STUDY BE CONDUCTED TO EVALUATE THE IMPACT OF THE PROPOSED PROJECT?  Yes  No

BRIEFLY DESCRIBE THE PLANNED BUILDING RESILIENCY IMPROVEMENTS.

HAVE YOU IDENTIFIED A CONTRACTOR FOR YOUR PROJECT?  Yes  No

CONTRACTOR NAME	ESTIMATED PROJECT COST \$ _____	ESTIMATED START DATE	ESTIMATED COMPLETION DATE
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## PROJECT COST ESTIMATES

COMPLETE THE FOLLOWING TO ESTIMATE AMOUNT OF **PROPERTYFIT** FINANCING.

IMPROVEMENT COSTS (INCLUDING LABOR, MATERIALS, PERMITS)	\$	
PERFORMANCE AUDITS/REPORTS		
ARCHITECT/ENGINEERS AND OTHER SOFT COSTS		
OTHER COSTS (DESCRIBE)		
<b>TOTAL PROJECT COSTS</b>	<b>\$</b>	
CLOSING COSTS		
CAPITALIZED INTEREST		
ESTIMATED REBATES		( )
OWNER CONTRIBUTION		( )
<b>TOTAL PROPERTY FINANCING REQUESTED</b>	<b>\$</b>	

## SUPPLEMENTAL INFORMATION/ADDENDUMS

THE FOLLOWING SUPPLEMENTAL INFORMATION/ADDENDUMS MUST BE SUBMITTED WITH THIS APPLICATION:

OWNER ORGANIZATIONAL DOCUMENTS (SUBMIT WHAT APPLIES TO YOUR TYPE OF LEGAL STRUCTURE)

- BYLAWS
- ARTICLES OF INCORPORATION/PARTNERSHIP AGREEMENT
- OPERATING AGREEMENT

PROPERTY INFORMATION

*EXISTING BUILDINGS*

- CURRENT OPERATING BUDGET AND YEAR-TO-DATE INCOME/EXPENSE STATEMENT
- PAST 2-YEARS INCOME/EXPENSE STATEMENTS, CASH FLOW STATEMENTS AND YEAR-END BALANCE SHEETS
- MOST RECENT 2-YEARS TAX RETURNS
- COMPLETED SCHEDULE OF MORTGAGES ([APPLICATION ADDENDUM, TAB 1](#)) FOR THE PROPERTY
- COMPLETED SCHEDULE OF LEASES ([APPLICATION ADDENDUM, TAB 2](#)) FOR THE PROPERTY
- COMPLETED PROJECT IMPROVEMENT TABLE ([APPLICATION ADDENDUM, TAB 3](#))
- COPY OF MOST RECENT APPRAISAL

*NEW CONSTRUCTION/MAJOR RENOVATIONS*

- DETAILED OPERATING PROFORMA
- DETAILED PROJECT BUDGET
- SOURCES AND USES SPREADSHEET (WITH DETAILED FINANCING/INVESTMENT TERMS)
- COPY OF MOST RECENT APPRAISAL
- NAME AND CONTACT INFORMATION FOR THE ENTIRE DEVELOPMENT TEAM

## SOCIAL EQUITY COMMITMENT

BOTH PROSPER PORTLAND (FORMERLY PORTLAND DEVELOPMENT COMMISSION) AND MULTNOMAH COUNTY HAVE STRONG COMMITMENTS TO ADVANCING SOCIAL EQUITY BY INCREASING ECONOMIC OPPORTUNITY FOR HISTORICALLY DISADVANTAGED POPULATIONS AND CREATING EQUITABLE ACCESS TO LIVING WAGE JOBS AND WEALTH CREATION OPPORTUNITIES. A GOAL OF **PropertyFit** IS TO SUPPORT THE GROWTH AND DIVERSITY OF THE PORTLAND REGION'S DESIGN, ENGINEERING, AND CONSTRUCTION SECTORS BY ENCOURAGING LONG-TERM BUSINESS-TO-BUSINESS RELATIONSHIPS BETWEEN MAJORITY- AND MINORITY- OWNED FIRMS. WE ARE SEEKING PROPERTY OWNER, CONTRACTORS AND CAPITAL PROVIDERS THAT SHARE THESE VALUES AND WILL COMMIT TO PARTICIPATING IN ACTIVITIES DESIGNED TO FURTHER THAT END.

BRIEFLY DESCRIBE HOW YOU WILL HELP ADVANCE **PROPERTYFIT'S** SOCIAL EQUITY COMMITMENT.

## INFORMATION RELEASE AUTHORIZATION

I AM THE OWNER OF THE PROPERTY LISTED ABOVE AND AM EXPLORING OPPORTUNITIES TO IMPROVE THE PERFORMANCE OF MY BUILDING. AS PART OF THIS EXPLORATION I AM EVALUATING THE BENEFIT OF USING THE PROPERTYFIT PROGRAM TO FINANCE ELIGIBLE IMPROVEMENTS. TO SUPPORT THIS INVESTIGATION, I HEREBY AUTHORIZE PROPERTYFIT TO VERIFY INFORMATION CONTAINED IN MY REQUEST FOR FINANCIAL ASSISTANCE AND IN OTHER DOCUMENTS REQUIRED IN CONNECTION WITH THIS REQUEST.

I FURTHER AUTHORIZE OTHERS, INCLUDING ENERGY TRUST OF OREGON, AND THEIR REPRESENTATIVES, TO ENGAGE WITH PROSPER PORTLAND, **PROPERTYFIT** PROGRAM ADMINISTRATOR:

- IN A REVIEW OF THE BUILDING RESILIENCY IMPROVEMENT OPTIONS FOR MY BUILDING;
- IN THE PLANNING, EXECUTION AND COMPLETION OF BUILDING PERFORMANCE AUDITS AND STUDIES;
- TO DISCUSS THE OVERALL PROJECT SCOPE AND FINANCING PACKAGE TO SUPPORT THE IMPROVEMENTS, INCLUDING POSSIBLE ENERGY TRUST INCENTIVES; AND,
- TO RELEASE COPIES OF ANY RESULTING REPORTS OR STUDIES TO **PROPERTYFIT**.

## SIGNATURE

THE INFORMATION PROVIDED IN THIS APPLICATION AND ANY SUPPLEMENTS HERETO IS SUBMITTED VOLUNTARILY AND IS CORRECT AND COMPLETE TO THE BEST OF MY KNOWLEDGE AND BELIEF. THE UNDERSIGNED IS AN AUTHORIZED OFFICER OF THE APPLICANT AND IS AUTHORIZED TO MAKE THIS APPLICATION, TO NEGOTIATE ANY RESULTING AGREEMENT AND TO CONTRACTUALLY BIND THE APPLICATION. BY SIGNING THIS APPLICATION, APPLICANT AGREES TO ADHERE TO THE TERMS AND CONDITIONS OF THE PROGRAM AS OUTLINED IN THE **PROPERTYFIT** PROGRAM GUIDE AS SAME MAYBE AMENDED FROM TIME-TO-TIME BY PROGRAM ADMINISTRATOR. APPLICANT AUTHORIZES THE PROSPER PORTLAND AS PROGRAM ADMINISTRATOR, TO COMPLETE ANY NECESSARY BACKGROUND CHECKS FOR PARTICIPATION IN THE **PROPERTYFIT** PROGRAM.

SIGNATURE

DATE

NAME (PLEASE PRINT)

TITLE

SIGNATURE

DATE

NAME (PLEASE PRINT)

TITLE