

APPENDIX A: PACE MASSACHUSETTS APPLICATION

This is the application that must be completed and submitted to MassDevelopment for each proposed project for PACE Massachusetts.



PROPERTY OWNER'S INFORMATION

Property Owner's Name

Property Owner's Address

Telephone Email

Property Owner Type

- Corporation
 Sole Proprietorship
 Nonprofit Corporation
 S-Corporation
 Partnership
 Limited Liability Corporation
 Other (describe):

Date Property Ownership Began

PRIMARY CONTACT / PREPARER'S INFORMATION *(Authorized representative, if different from Property Owner)*

Preparer's Name

Preparer's Company Title

Address City State Zip Code

Telephone Email

PROJECT SITE LOCATION

Project Address City State Zip Code

County Assessor Parcel ID Number

PROPERTY INFORMATION

New construction or existing Total gross building square footage

If existing, year constructed Number of stories

Is the project permitted If yes, date of construction permit

Is the project completed If yes, when was it completed

Building Description (if existing, include current use(s), hours of operation)

PROPERTY TYPE

Commercial <input type="checkbox"/>	Industrial/Manufacturing <input type="checkbox"/>
Office <input type="checkbox"/>	Retail <input type="checkbox"/>
Mixed-use <input type="checkbox"/>	Housing/Multi-family (5+ units) <input type="checkbox"/>
Other (please describe below in project description) <input type="checkbox"/>	

PROJECT DESCRIPTION

Proposed improvements include *(check all that apply)*

Electrification <input type="checkbox"/>	Lighting <input type="checkbox"/>	HVAC <input type="checkbox"/>
Solar PV <input type="checkbox"/>	All Electric Space Heating/Heat Pumps <input type="checkbox"/>	Building Management System/Controls <input type="checkbox"/>
Building Envelope <input type="checkbox"/>	Geothermal <input type="checkbox"/>	EV Charging <input type="checkbox"/>
	Other <input type="checkbox"/>	

If other, please describe:

For solar and other renewable technologies, what is the proposed size of the system?

Have you applied for and been awarded energy efficiency or renewable energy financial incentives through Mass Save or your MLP or Massachusetts Clean Energy Center? Yes No

Will the proposed energy improvements be owned by the property owner? Yes No

Will the proposed energy improvements be permanently fixed to the property? Yes No

PROJECT INFORMATION *(for new construction or renewables energy systems alone)*

Project Pathway

Retrofit: Energy Efficiency Retrofits	<input type="checkbox"/>
Retrofit: Renewable Energy Improvements	<input type="checkbox"/>
New Construction: Specialized Code	<input type="checkbox"/>
New Construction: Stretch Code	<input type="checkbox"/>
New Construction: Base Code Plus One	<input type="checkbox"/>

TECHNICAL INFORMATION

Name of Project Developer *(if known)*:

TOTAL ESTIMATED PROJECT COSTS

List all anticipated sources of energy efficiency and/or renewables financial incentives)

Total Estimated Construction Costs		\$
Upfront:		
Energy efficiency incentives		\$
Renewable energy incentives		\$
Other: _____		\$
Ongoing:		
Renewable energy incentives		\$
Other: _____		\$
Total Estimated Net Project Costs		\$

Note: Additional technical information will be required; refer to the technical guidelines for more information.

PROPERTY OWNER FINANCIAL INFORMATION

Have you selected a PACE Capital Provider? Yes No

Do you need assistance finding a Capital Provider? Yes No

REQUESTED PACE FINANCING AMOUNT

Senior Lender / Mortgage Holder:

Outstanding mortgage balance: Repayment terms:

Monthly payment: Remaining term of mortgage:

Second Mortgage Holder (if applicable):

Monthly payment: Remaining term of mortgage

What is the assessed value of the property? (*Attach a copy of current property tax bill.*) Year: Assessed Value: \$

Has an appraisal been done on the property in the past three years? Yes No Year: Appraised Value: \$

In the last 3 years, has there been a major renovation? Yes No If so, in what year? Year:

In the next 5 years, are any renovations planned? Yes No

Are there any current betterment assessments on the property? Yes No

Have there been any releases of hazardous materials at or affecting the property? Yes No

Is there a lien under M.G.L. Chapter 21E on the property? Yes No

Do you currently pay property taxes on the property? Yes No

Are all mortgage payments current? Yes No

Have there been any delinquencies in mortgage payments for 60 days or more in the past 24 months? Yes No

Has a foreclosure proceeding been commenced against the property in the prior 24 months? Yes No

Is the property in a bankruptcy proceeding? Yes No

Has the property owner been subject to a bankruptcy proceeding in the past seven years? Yes No

Have your property taxes ever been delinquent (by 30 days or more) in the past 3 years? Yes No

Are there any tax liens or notices of default on the property? Yes No

Does the owner have sufficient net cash flow equal to or greater than the proposed annual PACE assessment? Yes No

IMPORTANT NOTICE

MassDevelopment will be represented by attorneys of their choice in the review of the terms of the transaction documents and in any related legal matters arising prior to the closing of the financing. In addition, MassDevelopment will charge a fee upon closing based upon a predetermined fee schedule. The Department of Energy Resources may also charge a Project Review Fee. By submitting this Application, the Applicant agrees that all incurred fees will be the responsibility of the applicant even if the financing fails to close.

The representations included in this application shall survive the closing of any resulting PACE Massachusetts financing.

The owner agrees that if it participates in PACE Massachusetts, it shall include MassDevelopment in any public relations events or materials related to the project and cooperate with and permit MassDevelopment to publicize its assistance, for marketing and public relations purposes, including, but not limited to, signage, press releases, public events, and promotional materials.

By submitting this request, I represent and certify to the best of my knowledge and belief that the information provided herein, and any exhibits or attachments hereto, is true and complete and accurately describes the proposed project. I agree to promptly inform MassDevelopment of any changes which may occur.

SIGNATURE(S)

Owner: _____ _____	Preparer (if different): _____ _____
Name: _____ <i>(Please print clearly)</i>	Name: _____ <i>(Please print clearly)</i>
Company: _____ <i>(Please print clearly)</i>	Company: _____ <i>(Please print clearly)</i>
Date: _____	Date: _____

MassDevelopment, 99 High Street, Boston, MA 02110
Attn: PACE Program Director
