

Instructions for Completing Pre-Application Form

This Energize New York Finance Program Pre-Application is the first step of a two-step application process for a COMMERCIAL? Property Owner to apply and receive approval for financing through Energize NY for qualified energy efficiency or renewable energy generation Improvements.

A Pre-Application must be submitted for each tax parcel. The Program Administrator will review this Pre-Application and determine if all initial eligibility requirements are met. If so, the Owner will be issued a Conditional Reservation Number for participation in the Program.

The Conditional Reservation Number will remain valid for 90 days and may be extended with permission as long as the Owner demonstrates progress towards submitting the final application.

Questions? If you have any questions about the pre-qualifying process or need assistance completing the Pre-Application form, please contact the Program Administrator at 914-302-7300 or finance@energizeny.org. You can also refer to the Pre-Qualify Section of our Program Handbook, available on the website <http://Commercial.EnergizeNY.org>

PRE-APPLICATION FORM

Part 1: Property Information

Applicant Primary Contact (person to whom all correspondence will be directed)

Name _____ Title _____

Email _____ Phone _____

Mailing Street Address _____

City _____ State _____ Zip _____

Relationship of Primary Contact to Property (check all that apply)

- Owner/Co-Owner
- Trustee
- Officer
- Agent under Power of Attorney
- Authorized Representative
- Contractor
- Other _____

Property Owner Type (check one)

- Corporation
- Limited Liability Company
- Partnership
- 501(c)(3) Non-Profit Organization
- Trust
- Individual(s) / Joint Tenants / Common Property (Not in Trust)
- Other _____

Additional Authorized Point of Contact (optional)

Name _____ Title _____

Email _____ Phone _____

Mailing Street Address _____

City _____ State _____ Zip _____

Relationship of Additional Contact to Property

- Owner/Co-Owner
- Trustee
- Officer
- Agent under Power of Attorney
- Authorized Representative
- Contractor
- Other _____

Business Name _____

Legal Business Name (if different) _____

Legal Name of Entity that Actually Owns the Property(s) or Legally Authorized Representative as they appear on Property Title

Owner 1 Name (printed) _____

Owner 2 Name (printed) _____

Owner 3 Name (printed) _____

Property Description (if more than one parcel, please complete and submit this page for each parcel)

Address of Property

Street _____ City _____

State _____ Zip _____ County _____

Taxing Jurisdiction's Parcel Identification Number _____

Taxing Jurisdiction for property identification _____

Property Type (check one)

- Residential (4 or less units)
- Multifamily (5 or more units)
- Hotel/Hospitality
- Warehouse
- Industrial
- Agriculture
- Education
- Hospital
- Lab
- Data Center
- Office
- Retail
- Food Service
- Other _____

Property Occupants (check one) Owner-occupied Tenants/Leased

What year was the building built? _____ What is the total gross building square footage? _____ (sq ft)

Is there currently a mortgage on the Property? Yes No

If there is a mortgage, who is the lender and what is the outstanding balance on the Property (attach additional pages if necessary)

Mortgage Lender/Holder (1) _____

Outstanding Mortgage Amount (\$) (1) _____

Mortgage Lender/Holder (2) _____

Outstanding Mortgage Amount (\$) (2) _____

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

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

What is the approximate value of the Property? _____

What is the total of all debt secured by the Property? _____

Is the Property subject to a bankruptcy proceeding? Yes No

Has the Owner of the Property filed for bankruptcy at any time within the past seven years? Yes No

Part 2: Property Eligibility

Please review the Property eligibility requirements in the “Pre-Qualify: Eligibility Requirements” section of the Program Handbook. By checking the box below, you are certifying that the subject Property is eligible to receive Energize Financing. Do not check the box if you do not understand the Property eligibility requirements or have reason to believe your Property will not conform to eligibility requirements.

Property Eligible Requirements	Check to Certify
I have read the Property eligibility requirements detailed in “Pre-Qualify: Eligibility Requirements” of the Program Handbook and certify as to the subject Property’s conformance thereto.	

Please estimate the current Loan-to-Value (LTV) ratio on the Property, including the mortgage and all Property secured debts. LTV is calculated by dividing the total of all debt secured by the property, by the estimated value of the property.

Example: The commercial property is valued/appraised at \$600,000. There are two mortgages totaling \$300,000 on the property. The LTV is .50 or 50% (\$300,000/\$600,000).

After calculating the LTV ratio, in your estimation, does the total debt secured by the property exceed 80% of the Property Value? Yes No

I am considering a:

- Renewable energy project (wind, solar, geothermal) Demand Management (CHP, Energy storage, Fuel cell)
- Energy Efficiency project (e.g. insulation, high efficiency boiler, lighting, controls)

RELATED NOTES AND DETAILS: If there are any additional notes or details you feel are important for the Program to take into consideration in reviewing your submission, please include them below. You may add additional sheets if necessary. (If your property is in Westchester County and is non profit-owned or is affordable housing, please indicate here your interest in The Energize NY Westchester Project.) _____

Part 3: Property Owner Due Diligence

By checking below, each Owner of record of the Property, or the Owner’s authorized representative(s) hereby represent, warrant and affirm that the Owner has done its due diligence to confirm that all representations, warranties and information contained in this Pre-Application are truthful, accurate, and complete; and has read and understood, and agrees to, the terms and conditions set forth in the Program Handbook.

Initial to Certify

Initial to Certify

Initial to Certify

SUBMIT: Please use the Submit button below to email your completed document to preapp@energizeny.org. If you prefer, you can fax your completed document to (914) 302-7304 or mail them to Energize NY, 2051 Baldwin Road, Yorktown Heights, NY 10598, Attn: Commercial Finance - Pre-Application.

Questions? Please call (914) 302-7300 or email finance@energizeny.org