



# Energy Efficiency Revolving Loan Fund Loan Application

## OPERATING COMPANY INFORMATION

Operating Company Name: \_\_\_\_\_ Tax ID: \_\_\_\_\_

Street Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Mailing Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Primary Contact: \_\_\_\_\_ Work Phone: \_\_\_\_\_ Work Fax: \_\_\_\_\_

Email: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

NAICS Code: \_\_\_\_\_

Current number of full-time employees: \_\_\_\_\_

Number of employees to be hired within 2 years as a result of this project: \_\_\_\_\_

### Operating Company Ownership Breakdown (must equal 100%)

Name (First, Middle, Last Name)	Ownership %	SSN	Date of Birth	Home Address (Street, City, State, Zip Code)

## REAL ESTATE HOLDING COMPANY INFORMATION

Please complete the section below **ONLY** if you have/will be creating a **PASSIVE** real estate holding company that will hold title to the real estate you are purchasing, improving, or constructing.

Real Estate Holding Company Name: \_\_\_\_\_ Tax ID: \_\_\_\_\_

Street Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Mailing Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

### Real Estate Holding Company Ownership Breakdown (must equal 100%)

Name (First, Middle, Last Name)	Ownership %	SSN	Date of Birth	Home Address (Street, City, State, Zip Code)

## OWNERSHIP DEMOGRAPHIC INFORMATION

A separate demographic information section should be completed for each individual who holds or controls 20 percent or more of the beneficial ownership in the Applicant small business(es).

Name:					
Veteran Status	Non-Veteran	Veteran	Service-Disabled Veteran Spouse of Veteran		
Gender	Male	Female			
Race	American Indian/Alaska Native	Asian	Black or African American Native Hawaiian/Pacific Islander White		
Ethnicity	Hispanic/Latino	Not Hispanic/Latino			
Questions			Yes	No	
1.	Is the Applicant presently suspended, debarred, proposed for debarment, declared ineligible, voluntarily excluded from participation in a transaction by any Federal department or agency, or presently involved in any bankruptcy?				
2.	Is the Applicant currently delinquent or have ever defaulted on a direct or guaranteed loan from SBA, or another Federal agency loan program (including, but not limited to USDA, B&I, FSA, FHA, EDA), or been a guarantor on such a loan?				
3.	Is the Applicant currently incarcerated serving a sentence of imprisonment imposed upon adjudication of guilty, or is under indictment for a felony or any crime involving or relating to financial misconduct or a false statement?				
4.	Is the Applicant an SBA employee or a Household Member of an SBA employee? "Household Member" means spouse and minor children of an employee, all blood relations of the employee and any spouse who resides in the same place of abode with the employee.				
5.	Is the Applicant a former SBA employee who has been separated from SBA for less than one year prior to the request for financial assistance?				
6.	Is the Applicant or a household member of such individual, a member of Congress, or an appointed official or employee of the legislative or judicial branch of the Federal Government?				
7.	Is the Applicant or a household member of such individual, a Federal Government employee or Member of the Military having a grade of at least GS-13 or higher (or Military equivalent)?				
8.	Is the Applicant or a household member of such individual, a member or employee of a Small Business Advisory Council or a SCORE volunteer?				
9.	Is the Applicant presently involved in any legal action (including divorce)?				

Name:					
Veteran Status	Non-Veteran	Veteran	Service-Disabled Veteran Spouse of Veteran		
Gender	Male	Female			
Race	American Indian/Alaska Native	Asian	Black or African American Native Hawaiian/Pacific Islander White		
Ethnicity	Hispanic/Latino	Not Hispanic/Latino			
Questions			Yes	No	
1.	Is the Applicant presently suspended, debarred, proposed for debarment, declared ineligible, voluntarily excluded from participation in a transaction by any Federal department or agency, or presently involved in any bankruptcy?				
2.	Is the Applicant currently delinquent or have ever defaulted on a direct or guaranteed loan from SBA, or another Federal agency loan program (including, but not limited to USDA, B&I, FSA, FHA, EDA), or been a guarantor on such a loan?				
3.	Is the Applicant currently incarcerated serving a sentence of imprisonment imposed upon adjudication of guilty, or is under indictment for a felony or any crime involving or relating to financial misconduct or a false statement?				
4.	Is the Applicant an SBA employee or a Household Member of an SBA employee? "Household Member" means spouse and minor children of an employee, all blood relations of the employee and any spouse who resides in the same place of abode with the employee.				
5.	Is the Applicant a former SBA employee who has been separated from SBA for less than one year prior to the request for financial assistance?				
6.	Is the Applicant or a household member of such individual, a member of Congress, or an appointed official or employee of the legislative or judicial branch of the Federal Government?				
7.	Is the Applicant or a household member of such individual, a Federal Government employee or Member of the Military having a grade of at least GS-13 or higher (or Military equivalent)?				
8.	Is the Applicant or a household member of such individual, a member or employee of a Small Business Advisory Council or a SCORE volunteer?				
9.	Is the Applicant presently involved in any legal action (including divorce)?				

## PROJECT INFORMATION

Address of new project: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ County: \_\_\_\_\_

Is the project property an existing building or new construction? Existing New Construction

Square footage of project building: \_\_\_\_\_ Square footage that your company will occupy: \_\_\_\_\_

Estimated Purchase of Land: \_\_\_\_\_ Estimated Construction Costs: \_\_\_\_\_

Estimated Equipment Costs: \_\_\_\_\_ Where will the required equity injection come from? \_\_\_\_\_

## TENANTS

*If there are any tenants that will remain in the building, please provide the following information. Also, please provide a copy of all existing leases.*

Tenant Name	Square Footage	Lease Expiration Date	Monthly Rent Amount
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

## AFFILIATED BUSINESSES

*Please list any business where any Principal(s) of this EERLF loan request maintains 50% or more ownership in another business (affiliate), controls the affiliate or the affiliate is a closely related entity. The affiliate business must submit the previous 2 years' tax returns and current financial statements that are within 90 days.*

Business Name	Owner	Ownership %	NAICS Code
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

## BUSINESS PROFILE

*Please complete the questions below or include a business plan.*

What type of business is this? What are the primary products and services of the business?

What is your outlook concerning the business activity in which you are engaged?

What primary markets use your products?

List key customers:

List major competitors:

Please provide a comprehensive overview of the company's history, including its background, business model, competitive advantages, and growth strategy.

Major past accomplishments:

How will this loan benefit your company?