



## Catalyst Term Loan

**Required Intake Documents:** Complete this brief online form: <https://www.tfaforms.com/4736075>

*Please include all documents below as attachments to this customer intake form.*

1. Most recent 2+ years of audited property financials, including balance sheet and income statement *(If previous calendar year audit report is unavailable, internal reports can substitute.)*
2. Current year budgeted vs. actual property income-expense
3. Current account statements for existing property debt (including mortgage statements)
4. Existing rent roll
5. Current bank statement for property reserve account

**Additional Intake Documents:**

*Please include any applicable and available documents from the list below as attachments to this customer intake form. IPC understands that your project may be a work in progress and that some of these documents may not be available yet.*

1. Project scope of work with upgrades expected to be funded with Catalyst loan (as available)
2. Project budget, with line items for each improvement to be funded with Catalyst loan (as available)
3. Indication of any targeted green building certifications (EnergyStar, LEED, Passive House, etc.)
4. FOR EFFICIENCY PROJECTS, copies of energy audit, energy opportunity assessment reports and/or PNA/IPNA, if already conducted
5. FOR SOLAR PROJECTS, copies of solar proposals or feasibility studies, if conducted
6. Documentation of any energy related subsidy commitments or expectations, including utility incentives, if available

**Applicant Acknowledgement:**

I, \_\_\_\_\_, the \_\_\_\_\_ of \_\_\_\_\_  
(Name) (Title) (Applicant Company)

as a representative of \_\_\_\_\_, hereby acknowledge that the information  
(Borrowing Entity Name)

submitted herein will be reviewed on a preliminary basis for project viability by Inclusive Prosperity Capital, Inc. and that no guarantee of financing has been offered nor accepted. I understand that the information submitted herein is for discussion purposes only, and that additional documentation submissions will be required for the Catalyst loan application to be complete. I further acknowledge that information provided to applicant about the Catalyst loan program is subject to change at any time.

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Applicant's Signature

Date