



Navigator Pre-Development Energy Loan

Required Intake Documents:

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

1. Most recent 2+ years of audited borrower 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 borrower income-expense
3. Current account statements for existing property debt (including mortgage statements)
4. Projected rent roll for completed project
5. Indication of any targeted green building certifications (LEED, Passive House, etc.)

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. Pre-development scope of work, with services to be funded with Navigator loan, if known
2. Pre-development budget, with line items for each item to be funded with Navigator loan, if known
3. Total project budget, including construction and permanent funding sources and uses, if known

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 Navigator loan application to be complete. I further acknowledge that information provided to applicant about the Navigator loan program is subject to change at any time.

Applicant's Signature

Date