



FSB - LOAN REQUEST - CHECKLIST

APPLICANT	CO-APPLICANT	FILE #
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For Internal Use Only

FSB - LOAN REQUEST – CHECKLIST
 (GSFA Residential Energy Retrofit Program)

Please submit the following documentation to:

Golden State Finance Authority (GSFA)
 1215 K Street, Suite 1650
 Sacramento, CA 95814
 Fax (916) 444-3219

✓	Items For All Projects	GSFA Form #
<input type="checkbox"/>	Energy Retrofit Contract(s)	
<input type="checkbox"/>	Addendum to Energy Retrofit Contract	Doc #50006
<input type="checkbox"/>	BANK Approval Letter	
<input type="checkbox"/>	PG&E utility bill (Provide copy of most recent statement)	

Additional Items for "GSFA Basic Home Upgrade" Projects		
<input type="checkbox"/>	GSFA Basic Home Upgrade Checklist of Measures	Doc #50029

Additional Items for "GSFA Advanced Home Upgrade" Projects		
<input type="checkbox"/>	Energy Auditing/Modeling Report (Test-in) – attach copy	
	Check which software was used:	
	<input type="checkbox"/> CAKESYSTEMS™	
	<input type="checkbox"/> SnuggPro	
	<input type="checkbox"/> OptiMiser®	

GSFA will process the Loan Request Package, on behalf of Five Star Bank, within 3-4 business days. Upon approval, GSFA will send Loan Documents to Contractor and/or Applicant(s) for signature(s). If application is not approved, GSFA will issue an Adverse Action Notice (AAN) to Applicant(s), and notify Contractor.