

FSB - LOAN REQUEST - CHECKLIST

| APPLICANT | CO-APPLICANT | FILE # |
|-----------|--------------|--------|
| | | |

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 # | |
|---|---|-------------|--|
| | Energy Retrofit Contract(s) | | |
| | Addendum to Energy Retrofit Contract | Doc #50006 | |
| | BANK Approval Letter | | |
| | PG&E utility bill (Provide copy of most recent statement) | | |
| | | | |
| | Additional Items for "GSFA Basic Home Upgrade" Projects | | |
| | GSFA Basic Home Upgrade Checklist of Measures | Doc #50029 | |
| | | | |
| | Additional Items for "GSFA Advanced Home Upgrade" Pro | jects | |
| | Energy Auditing/Modeling Report (Test-in) – attach copy | | |
| | Check which software was used: | | |
| | ☐ CAKESYSTEMS™ | | |
| | ☐ SnuggPro | | |
| | | | |

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.

Program is sponsored by Golden State Finance Authority (GSFA), a California Joint Powers Authority. Funding for this program is made possible through funding from Five Star Bank and may be supported in part by funds from Pacific Gas and Electric Company (PG&E). Program restrictions apply. Call GSFA at (855) 740-8422 for details.