



**LOAN & GRANT APPLICATION CHECKLIST**

BORROWER	CO-BORROWER	FILE #
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*For Internal Use Only*

**LOAN & GRANT APPLICATION – Checklist**  
(CHF Residential Energy Retrofit Program)

Please submit the following documentation to:

CRHFMA Homebuyers Fund (CHF)  
1215 K Street, Suite 1650  
Sacramento, CA 95814  
Fax (916) 444-3551

✓	Item	CHF Form #
<input type="checkbox"/>	SHPO Contractor Consultation Form*	Doc #390242
<input type="checkbox"/>	Energy Usage Data Release Form	Doc #390246
<input type="checkbox"/>	Authorization to Release Property Information	Doc #390247
<input type="checkbox"/>	CHF Loan and Grant Application	Doc #373230
<input type="checkbox"/>	Project Financial Analysis Worksheet	Doc #373233
<input type="checkbox"/>	Home Improvement Contract(s)	
<input type="checkbox"/>	HERS "In" Audit Info <ul style="list-style-type: none"> <li>▪ Energy Benefit Summary for Utilities</li> <li>▪ HERS Score Improvement Summary</li> </ul>	
<input type="checkbox"/>	Standard Equipment Cost Documentation	
<input type="checkbox"/>	Addendum to Home Improvement Contract	Doc #373249
<input type="checkbox"/>	Verification of Income	
<input type="checkbox"/>	Verification that Mortgage is Current (i.e. Current mortgage payment coupon, etc.)	
<input type="checkbox"/>	"Before" pictures of Property	
<b>*If the subject property requires SHPO review and approval, include the following:</b>		
<input type="checkbox"/>	Detailed description of project and all activities to be performed (include what will be done, how, what materials will be used)	
<input type="checkbox"/>	Front and side elevation color photos	
<input type="checkbox"/>	Color photos showing relevant architectural details and materials (e.g., roofline, windows, building materials, photos from across the street showing buildings on either side of subject property)	
<input type="checkbox"/>	If a known historic resource would be affected by the project, include documentation on status of historic properties (such as survey information or National Register of Historic Places or California Register of Historic Resources listing)	
<b>*If the work involves any ground disturbance, include the following:</b>		
<input type="checkbox"/>	Any recent geo-technical report or a summary of chain of title or land use of property and historic photographs, if available	
<input type="checkbox"/>	Map clearly identifying the project area	

**CHF will process Loan & Grant Application Package within 3-4 business days. If Application requires SHPO review, it will take an additional 5 business days or more for approval.**

**Upon approval, CHF will send Loan Documents to Contractor and/or Applicant(s) for signature(s). If application is not approved, CHF will issue an Adverse Action Notice (AAN) to Applicant(s), and notify Contractor.**

The CHF Residential Energy Retrofit Program is sponsored by CRHFMA Homebuyers Fund (CHF), a California Joint Powers Authority. Funding for the program is made possible through a grant award from the Energy Commission Energy Resources Conservation and Development Commission of the State of California. Program restrictions apply. Call CHF at (855) 740-8422 for details.