

## 7 Simple Steps to Get Your SELF Loan:

- 1. Fill out the Loan Application in completion. (follow the checklist for required document submission)
- 2. Expect a call from a SELF staff member.
- 3. Get quotes for your desired improvements from SELF's "Approved Contractor List".
- 4. Schedule a final consultation and/or a loan closing appointment with the SELF Loan Program Manager (LPM) or Loan Officer (LO).
- 5. Set up the time and date with your Approved Contractor(s) for your installation(s).
- 6. Enjoy your improvements!

[This section left intentionally blank. Please proceed to the Application.]

# SOLAR AND ENERGY LOAN FUND

# **LOAN APPLICATION**



#### **SOLAR AND ENERGY LOAN FUND – LOAN PROGRAM PROCESS**

Thank you for your interest in the non-profit Solar and Energy Loan Fund (SELF). SELF is an independent, non-profit, community-based lending organization focused on financing home renovations that promote energy efficiency, clean energy alternatives, storm protection, water conservation, and disability products. SELF provides homeowners with building science expertise, project management, and access to low cost capital to help identify and finance sustainable home improvement projects.

#### **Detailed Program Steps:**

- 1. Fill out the Loan Application completely and submit to SELF (the property owner must be the primary applicant). Follow the checklist for required document submission. Overall qualifications for being considered for approval for a low interest rate include: home ownership, creditworthiness, steady income, and proof of ability to repay the loan. Make sure to provide as much income information as possible with the application in order for the underwriter to make a sound decision (see checklist). If more information is needed, the property owner(s) will be contacted by the Loan Underwriting Department or the assigned Loan Program Manager/Loan Officer.
- 2. If the application is approved, the property owner(s) may choose to receive an energy assessment on the home based on the type of installation, and will be notified by the Loan Program Manager/Loan Officer to discuss the next steps, project management, financing options, and best improvement solutions.
- 3. The property owner(s) will be asked to request and obtain quotes from SELF's Approved Contractor List. It is recommended (but not required) to obtain more than one quote from multiple contractors from this list. (SELF will only provide financing for improvements completed by SELF's approved contractors.) If there is a quote prior to, or at, the application submission, please include it with the application.
- 4. Once the contractor(s) has/have been chosen, the property owner(s) will contact the Loan Program Manager/Loan Officer to schedule a final consultation and/or a loan closing appointment. The loan will be closed for the amount of the quote(s) less any utility cash rebates. SELF will issue a Notice to Proceed (NTP) letter to the contractor(s) to proceed with the improvements.
- **5.** When the improvements are complete, SELF will obtain the final paperwork from the contractor(s). SELF will proceed with the disbursement of funds (payment(s) to the contractor(s)), if the improvements are satisfactory to SELF standards.

#### **How to Submit Paperwork:**

#### Mail to:

Solar & Energy Loan Fund P.O. Box 5506 Fort Pierce, FL 34954

#### Visit us at:

Solar & Energy Loan Fund 2400 Rhode Island Ave. Fort Pierce, FL 34950

Apply online at: http://cleanenergyloanprogram.org/self-

<u>loan-application-homeowners</u>

**Phone**: 772-468-1818 **Fax**: 772-468-1811

Office Hours: 9:00 am - 5:00 pm Monday - Friday

Website: www.solarenergyloanfund.org Email: info@solarenergyloanfund.org

#### <u>Important Notes – Please Review:</u>

- The application will be considered valid for up to 6 months starting with the date SELF receives the application. After 6 months, the application process starts over.
- If the improvement(s) has/have already been completed, or the contractor(s) has/have started the installation, the application may not be accepted and/or the loan may not be approved. <u>Please notify SELF staff immediately for information.</u>
- 3. Please provide separate email addresses if there is more than one applicant. SELF utilizes DocuSign.com for remote closings.
- 4. Incompletion of the application and requirements may delay the underwriting and closing process.

## **Application Checklist:**

- Loan Application Packet (completed fully):
  - Application (Primary and Co-Applicant [if applicable])
  - Pre-Finance Questionnaire (direct link, SELF website link, or paper copy)
  - Budget Expense Form (SELF website or paper copy)
  - Loan Summary Information Form
- Please provide proof of income supported by one or more of the following Documents:
  - a. Most current 2 months' pay-stubs
  - b. Social Security and/or Disability Statement(s)(if applicable)
  - c. Retirement statement(s) (if applicable)
  - d. Any documents showing additional income not shown on tax returns
  - e. Rental Agreement for rental income (Tenants who are unrelated and unmarried to the primary applicant. Used when desired income is going to be used to qualify)
  - f. <u>Self Employed/Commission Borrowers</u> must provide most current 2 years of tax returns (1040 forms and 1120's when applicable). Include all pages and schedules. Profit and Loss Statements may also be requested.
- Clear copy of Driver's License(s) or other legal photo identification. (please do not fax)
- Military ID to receive military discount (only 1 ID is required)
  - Military ID (includes legal spouses)
  - Florida Driver's License with a Veteran designation (blue 'V')
  - DD Form 214
- I, the SELF applicant(s), have reviewed all of the important information regarding the SELF Program and how it works on page 2.

\*\*\*After an installation has been completed, SELF Loan Clients have 48-72 hours to respond to the Contractor Payment Authorization link. If no response is received, the SELF staff will assume the client is happy and will proceed with payment to the contractor(s). \*\*\*

\*SELF encourages all military personnel who are active, in the Reserve, disabled veterans, retired veterans, inactive (honorably discharged and/or voluntarily separated), and legal military spouses to provide a valid, government issued military ID with this application to receive the military discount that will be applied at the loan closing (see Rate Sheet for details).

\*You will receive a response from one of the SELF staff members to review your Application packet, and to also answer any questions you may have.

#### What type(s) of improvement(s) are you interested in? Sealing Lighting o Weatherization o Interior & Exterior Light Bulbs o Attic Floor Insulation o Skylight or Solar Tube o Roof Insulation o Other: \_\_\_\_ o Wall Insulation o Floor Foundation Insulation Pool/Plumbing o Insulation and Duct Repair o Pool pump o Other:\_\_\_\_\_ o Plumbing o Low Flow: Toilet Storm Resilience o Low Flow: Shower Head o Window Repair o Low Flow: Aerator o Window Replacement o Septic to sewer conversion o Doors o Irrigation Package o Garage Doors o Rain Water Barrel o Hurricane Shutters and Fasteners o Cistern o Window Shutters o Sprinkler Heads o Hail Protection o Drip Irrigation o Exterior Siding o Electric Water Heater o Other: o Gas Water Heater o Other:\_\_\_\_ **Heating Ventilation Air Conditioning/Cooling** o HVAC Solar Products/Window Film o Duct Testing and Repair o Solar Pool Heater o Ductwork o Solar Pool Pump o Programmable Thermostat o Solar Water Heater o Ceiling Fans o Photovoltaic o Kitchen & Bathroom Exhaust Fans o Solar Attic Fan o Whole House Attic Fan o Window Films and Solar Screens o Other:\_\_\_\_ o Other:\_\_\_\_ Roofing **Health and Safety** o Roof Replacement (Tile, Shingle, Metal) o Drywall Repair o Roof Repair and Reinforcement o Electric o Roof Soffit Vent Sealing/Flashing o Misc. Fixtures o Reflective Roof o DHW Timer o Other:\_\_\_\_\_ o Reflective Paint Coating o Soffit Baffles o Flashing **Disability Installations** o Hurricane Clips/Straps/Roof Anchors o Wheelchair ramps: ADAP o Other:\_\_\_\_\_ o Stair Lifts: ADAP o Showers: ADAP

o Walk-in tubs: ADAPo Grab bars/rails: ADAPo Doorway widening: ADAPo Hallway widening: ADAP

o Other:

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Child Support (\$)			Other Income/ Assets (*explain)		
What is your current household annual income? (includes all income from persons living in the home)			How long have you lived in the home?		
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Female Head of household? Y / N	Asian				
Total # of household members:			# of household members:		
			Applicant occupies this	Under 18:	Over 62:
How did you hear about us?			property:		YN
Do you now or have you ever se	rved in the Armed Forces? (Active duty, N Guard, Re				d you consider yourself: eranService-disabled veteran
I (we) hereby authorize SELF or its auth	orized agent to obtain and review my credi	lit repo			
Applicant Signature:					Date:
	security numbers solely for the purpose o	of obtai	ning credit reports of applicants to ev	/aluate thei	r financial status for program eligibility,
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Retirement (5)  Other Monthly Income (5)  Source of (Other Monthly Income)  Source of (Other Monthly Income)  Other Income/ Assets (*explain)  What is your current household annual income if different than parimary? (Includes all income from persons living in the home)  DEMOGRAPHIC INFORMATION  File following information is requested by Solar and Energy Loan Fund (SELF) for certain types of loans related to a dwelling in order to monitor the lender's compliance with equal credit opportunity (ECOA). You are not required to furnish this information, promote the thinking in the thories of this information, or on whether you choose to furnish It. If you furnish the information, please provide both ethnicity and race. For race, you may check more than one designation. If you do not furnish the information, please provide both ethnicity and race. For race, you may check more than one designation. If you do not wish to furnish this information, please check the box below.  I do not wish to furnish this information  Please choose one answer from leach section:  MARITAL STATUS:  Married  Separated  Widowed  Other Pacific Islander  White  Black or African American  Asian  Date:  SELF collects, uses, and releases social security numbers solely for the purpose of obtaining credit reports of applicants to evaluate their financial status for program eligibility,					
Retirement (5)  Other Monthly Income (5)  Source of (Other Monthly Income)  Source of (Other Monthly Income)  Other Income/ Assets (*explain)  What is your current household annual income if different than parimary? (Includes all income from persons living in the home)  DEMOGRAPHIC INFORMATION  File following information is requested by Solar and Energy Loan Fund (SELF) for certain types of loans related to a dwelling in order to monitor the lender's compliance with equal credit opportunity (ECOA). You are not required to furnish this information, promote the thinking in the thories of this information, or on whether you choose to furnish It. If you furnish the information, please provide both ethnicity and race. For race, you may check more than one designation. If you do not furnish the information, please provide both ethnicity and race. For race, you may check more than one designation. If you do not wish to furnish this information, please check the box below.  I do not wish to furnish this information  Please choose one answer from leach section:  MARITAL STATUS:  Married  Separated  Widowed  Other Pacific Islander  White  Black or African American  Asian  Date:  SELF collects, uses, and releases social security numbers solely for the purpose of obtaining credit reports of applicants to evaluate their financial status for program eligibility,	INCOME	MONTHLY (GROSS \$)	INCOME		MONTHLY (GROSS \$)
Other Monthly Income (\$)  Net Rental (If receiving rent from tenants) (\$)  Notified Support (\$)  Will you be assuming the monthly loon payments on behalf of the primary applicant if application is requised by Solar and Energy Loan Fund (\$ELF) for certain types of loans related to a dwelling in order to monitor the lender's compliance with equal rend (approvable). You are not required to furnish this information, you on on trimish ethnicity, race, or sex, under Federal regulations, this lender the information on the basis of visual observation and surname fyou have made this application in person. If you do not furnish the information, please check the box below.  Demographic in the primary application in person. If you do not furnish the information, please check the box below.  Demographic in the primary application in person. If you do not furnish the information, please check the box below.  Demographic in the primary application in person. If you do not wish to furnish the information, please check the box below.  Defease choose one answer from pack because the primary application in person. If you do not wish to furnish this information  Please choose one answer from pack because the primary application in person. If you do not wish to furnish the information please check the box below.  Defease choose one answer from pack because the primary application in person. If you do not wish to furnish the information on the basis of visual observation and surname for the primary application in person. If you do not wish to furnish the information, please check the box below.  Defease choose one answer from pack because the primary application in person. If you do not wish to furnish the information on the basis of visual observation and surname for the primary application in person. If you do not wish to furnish the information, please check the box below.  Defease choose one answer from pack because the primary application in person. If you for the purpose of primary application in person. If you for the purpose	INCOME	Wicking (GRess \$)	INCOME		MONTHE (GROSS \$)
Source of (Other Monthly Income)  Other Income/ Assets (*explain)  Will you be assuming the monthly loan payments on behalf of the primary applicant if application is approved?  DEMOGRAPHIC INFORMATION  DEMOGRAPHIC INFORM	Full-Time Employment (\$)		Retirement (\$)		
Source of (Other Monthly Income)  Other Income/ Assets (*explain)  Will you be assuming the monthly loan payments on behalf of the primary applicant if application is approved?  DEMOGRAPHIC INFORMATION  DEMOGRAPHIC INFORM	Don't Time Franciscome (C)		Other Menthly Income (¢)		
Co-Applicant Signature:  Other Income/ Assets (*explain)  Will you be assuming the monthly loan payments on behalf of the primary applicant if application is approved?  DEMOGRAPHIC INFORMATION  DEMOGRAPHIC INFORMATION  The following information is requested by Solar and Energy Loan Fund (SELF) for certain types of loans related to a dwelling in order to monitor the lender's compliance with equal redit opportunity (ECOA). You are not required to furnish this information, but are encouraged to do so. The law provides that a lender may not discriminate either on the basis of this information, or on whether you choose to furnish it. If you furnish the information, please provide both ethnicity and race. For race, you may check more than one designation. If you do not furnish thenicity race, or sex, under Federal regulations, this lender is required to note the information on the basis of visual observation and surname fyou have made this application in person. If you do not wish to furnish the information, please check the box below.  I do not wish to furnish this information  Please choose one answer from each section:  ABARITAL STATUS:  MARITAL STATUS:  American Indian or Native American  Alaska Native  Alaska Native  Other Pacific Islander  White  Black or African American  Asian  MARITAL STATUS:  Domestic Partnership  Never Married  Domestic Partnership  Never Married  Domestic Partnership  Never Married	Net Rental (If receiving rent from		Other Wonthly Income (\$)		
Will you be assuming the monthly loan payments on behalf of the primary applicant if application is approved?  DEMOGRAPHIC INFORMATION  DEMOGRAPHI	tenants) (\$)		Source of (Other Monthly Income	)	
DEMOGRAPHIC INFORMATION   In order to monitor the lender's compliance with equal redit opportunity? (includes all income from persons living in the home)   DEMOGRAPHIC INFORMATION	Child Support (\$)		Other Income/ Assets (*explain)		
DEMOGRAPHIC INFORMATION  The following information is requested by Solar and Energy Loan Fund (SELF) for certain types of loans related to a dwelling in order to monitor the lender's compliance with equal redit opportunity (ECOA). You are not required to furnish this information, but are encouraged to do so. The law provides that a lender may not discriminate either on the basis of this information, or on whether you choose to furnish it. If you furnish the information, please provide both ethnicity and race. For race, you may check more than one designation. If you do not furnish ethnicity, race, or sex, under Federal regulations, this lender is required to note the information on the basis of visual observation and surname fyou have made this application in person. If you do not wish to furnish the information, please check the box below.  I do not wish to furnish this information  Please choose one answer from each section:  Alaska Native  No  American Indian or Native American  Alaska Native  Native Hawaiian  GENDER:  Black or African American  Asian  MARITAL STATUS:  MARITAL STATUS:  Domestic Partnership  Never Married  Domestic Partnership  Never Married  Date:  **SELF collects, uses, and releases social security numbers solely for the purpose of obtaining credit reports of applicants to evaluate their financial status for program eligibility,	What is your current household		Will you be assuming the monthly	,	
DEMOGRAPHIC INFORMATION  The following information is requested by Solar and Energy Loan Fund (SELF) for certain formation and the equal credit opportunity (ECOA). You are not required to furnish this information, but are encouraged to do so. The law provides that a lender may not discriminate either on the basis of this information, or on whether you choose to furnish it. If you furnish the information, please provide both ethnicity and race. For race, you may check more than one designation. If you do not furnish ethnicity, race, or sex, under Federal regulations, this lender is required to note the information on the basis of visual observation and surname fyou have made this application in person. If you do not wish to furnish the information, please check the box below.  If do not wish to furnish this information  Please choose one answer from each section:  RACE:  American Indian or Native American  Alaska Native  No  Other Pacific Islander  White  Domestic Partnership  Never Married  Domestic Partnership  Never Married  Date:  PSELF collects, uses, and releases social security numbers solely for the purpose of obtaining credit reports of applicants to evaluate their financial status for program eligibility,	annual income if different than		11		
DEMOGRAPHIC INFORMATION  The following information is requested by Solar and Energy Loan Fund (SELF) for certain types of loans related to a dwelling in order to monitor the lender's compliance with equal redit opportunity (ECOA). You are not required to furnish its information, but are encouraged to do so. The law provides that a lender may not discriminate either on the basis of this information, or on whether you choose to furnish it. If you furnish this information, please provide both ethnicity and race. For race, you may check more than one designation. If you do not furnish ethnicity, race, or sex, under Federal regulations, this lender is required to note the information on the basis of visual observation and surname from you have made this application in person. If you do not wish to furnish the information, please check the box below.  I do not wish to furnish this information  Please choose one answer from each section:  RACE:  Alaska Native  Native Hawaiian  GENDER:  Other Pacific Islander  White  Black or African American  Asian  MARITAL STATUS:  MARITAL STATUS:  Widowed  Divorced  Divorced  Domestic Partnership  Never Married  Never Married  SELECOLOPAPPLICANT Signature:  Date:  SELECOLOPAPPLICANT Signature to required to note the information on the basis of visual observation and surname frequired to note the information on the basis of visual observation and surname frequired to note the information on the basis of visual observation and surname frequired to note the information on the basis of visual observation and surname frequired to note the information on the basis of visual observation and surname frequired to note the information, please check the box below.  MARITAL STATUS:  Domestic Partnership  Never Married  SENDER:  SELECOLOR Signature:  Date:	persons living in the home)				
redit opportunity (ECOA). You are not required to furnish this information, but are encouraged to do so. The law provides that a lender may not discriminate either on the basis of this information, or on whether you choose to furnish this. If you furnish the information, please provide both ethnicity and race. For race, you may check more than one designation. If you do not furnish ethnicity, race, or sex, under Federal regulations, this lender is required to note the information on the basis of visual observation and surname from you have made this application in person. If you do not wish to furnish the information, please check the box below.    I do not wish to furnish this information    Please choose one answer from Beach section:		DEMOGRAPHI		•	
of this information, or on whether you choose to furnish it. If you furnish the information, please provide both ethnicity, and race. For race, you may check more than one designation. If you do not furnish ethnicity, race, or sex, under Federal regulations, this lender is required to note the information on the basis of visual observation and surname fyou have made this application in person. If you do not wish to furnish this information    I do not wish to furnish this information    Please choose one answer from each section:   HISPANIC ORIGIN:	The following information is requested	by Solar and Energy Loan Fund (SELF) for certain	types of loans related to a dwelling in	n order to n	nonitor the lender's compliance with equal
designation. If you do not furnish ethnicity, race, or sex, under Federal regulations, this lender is required to note the information on the basis of visual observation and surname f you have made this application in person. If you do not wish to furnish the information, please check the box below.  I do not wish to furnish this information  Please choose one answer from each section:  HISPANIC ORIGIN:  American Indian or Native American  Alaska Native  Native Hawaiian  Other Pacific Islander  White  Black or African American  Asian  Date:  Co-Applicant Signature:  Date:  Date:					
f you have made this application in person. If you do not wish to furnish the information, please check the box below.  I do not wish to furnish this information  Please choose one answer from each section:  HISPANIC ORIGIN:  Alaska Native  NO  GENDER:  White  Black or African American  Asian  Married  Separated  Widowed  Divorced  Domestic Partnership  Never Married  Never Married  Co-Applicant Signature:  Date:  SELF collects, uses, and releases social security numbers solely for the purpose of obtaining credit reports of applicants to evaluate their financial status for program eligibility,	1	·			
RACE:   MARITAL STATUS:   Married   Separated   Married   Separated   Milosed   Milo					
RACE: HISPANIC ORIGIN: American Indian or Native American NO NO GENDER: Other Pacific Islander White Black or African American Asian  Co-Applicant Signature:  RACE: MARTIAL STATUS: Married Separated Widowed Divorced Divorced Never Married  Co-Applicant Signature:  SELF collects, uses, and releases social security numbers solely for the purpose of obtaining credit reports of applicants to evaluate their financial status for program eligibility,	I do not wish to furnish this information	tion			
HISPANIC ORIGIN:  American Indian or Native American  Alaska Native  NO  No  GENDER:  Other Pacific Islander  White  Black or African American  Asian  Co-Applicant Signature:  SELF collects, uses, and releases social security numbers solely for the purpose of obtaining credit reports of applicants to evaluate their financial status for program eligibility,	Please choose one answer from	RACE:		MARITAL	L STATUS:
Alaska Native NO No Native Hawaiian Other Pacific Islander White Black or African American Asian  Co-Applicant Signature:  Separated Widowed Divorced Divorced Never Married		American Indian or Native American		○ Marr	ried
NO  GENDER: Other Pacific Islander Widowed Divorced Domestic Partnership Never Married  Co-Applicant Signature:  SELF collects, uses, and releases social security numbers solely for the purpose of obtaining credit reports of applicants to evaluate their financial status for program eligibility,	_			0	
GENDER:    Other Pacific Islander   Divorced   Domestic Partnership   Never Married     Other Married   Other Pacific Islander   Domestic Partnership   Never Married     Other Pacific Islander   Domestic Partnership   Never Married     Other Pacific Islander   Domestic Partnership   Never Married     Other Pacific Islander   Domestic Partnership   Never Married     Other Pacific Islander   Domestic Partnership   Never Married     Other Pacific Islander   Domestic Partnership   Never Married     Other Pacific Islander   Domestic Partnership   Never Married     Other Pacific Islander   Domestic Partnership   Never Married     Other Pacific Islander   Domestic Partnership   Never Married     Other Pacific Islander   Domestic Partnership   Never Married     Other Pacific Islander   Domestic Partnership   Never Married     Other Pacific Islander   Domestic Partnership   Never Married     Other Pacific Islander   Domestic Partnership   Never Married     Other Pacific Islander   Domestic Partnership   Never Married     Other Pacific Islander   Domestic Partnership   Never Married     Other Pacific Islander   Domestic Partnership   Never Married     Other Pacific Islander   Domestic Partnership   Never Married     Other Pacific Islander   Domestic Partnership   Never Married     Other Pacific Islander   Domestic Partnership   Never Married     Other Pacific Islander   Domestic Partnership   Never Married     Other Pacific Islander   Domestic Partnership   Never Married     Other Pacific Islander   Domestic Partnership   Never Married     Other Pacific Islander   Domestic Partnership   Never Married     Other Pacific Islander   Domestic Partnership   Never Married     Other Pacific Islander   Domestic Partnership   Never Married     Other Pacific Islander   Domestic Partnership   Never Married     Other Pacific Islander   Domestic Partnership   Never Married     Other Pacific Islander   Domestic Partnership   Never Married     Other Pacific Islander   Domestic Partnership   Never Married     Other Pacific Islander   Dom				_	
Female  Male  Black or African American  Asian  Co-Applicant Signature:  *SELF collects, uses, and releases social security numbers solely for the purpose of obtaining credit reports of applicants to evaluate their financial status for program eligibility,		-			
Male  Black or African American  Asian  Co-Applicant Signature:  *SELF collects, uses, and releases social security numbers solely for the purpose of obtaining credit reports of applicants to evaluate their financial status for program eligibility,					
Co-Applicant Signature:  *SELF collects, uses, and releases social security numbers solely for the purpose of obtaining credit reports of applicants to evaluate their financial status for program eligibility,	○ Female	White			•
Co-Applicant Signature:  *SELF collects, uses, and releases social security numbers solely for the purpose of obtaining credit reports of applicants to evaluate their financial status for program eligibility,	Male	Black or African American		○ Neve	r Married
*SELF collects, uses, and releases social security numbers solely for the purpose of obtaining credit reports of applicants to evaluate their financial status for program eligibility,		Asian			
*SELF collects, uses, and releases social security numbers solely for the purpose of obtaining credit reports of applicants to evaluate their financial status for program eligibility,					
*SELF collects, uses, and releases social security numbers solely for the purpose of obtaining credit reports of applicants to evaluate their financial status for program eligibility,	Co-Applicant Signature:				Date:
	*SELF collects, uses, and releases social				ir financial status for program eligibility,
and applicant social security numbers will not be used for any other purpose. The collection, use, and disclosure of social security numbers is necessary in order for SELF to perform its duties and responsibilities with regard to the program, and therefore is permitted as provided in Section 119.071(5)(a)2.a and 6.b, Florida Statutes.					

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\*Instructions: Please visit the SELF website at <a href="http://solarenergyloanfund.org/budget-form">http://solarenergyloanfund.org/budget-form</a> to complete and submit the **Budget Expense** form(s). If you do not have access to a computer, please complete the paper form(s) below and submit with your application via mail, office drop-off, or give to your SELF Loan Officer.

Prin	mary Applicant Name:		
	Out-of-Pocket Aver	age Expense Cate	egories
Category	Expenses	\$	Examples/Additional info
	Mortgage (P+I)		(if not on credit report)
Mortgage#1	Property tax payment (annual)		(if not in mortgage payment)
	HOA (annual)		(if not in mortgage payment)
	Home Owners Insurance (annual)		(if not in mortgage payment)
	Mortgage (P+I) [Rental]		(if not on credit report)
Mortgage#2	Property tax payment (annual)		(if not in mortgage payment)
	HOA (annual)		(if not in mortgage payment)
	Home Owners Insurance (annual)		(if not in mortgage payment)
	Alarm system/Cable/Internet (month)		
	Phone Services [cell, home] (month)		
Household	Utilities [Water, garbage, sewage] (month)		(if not included in tax bill)
<u>nousenoiu</u>	Electricity (avg bill month)		
	Groceries (month)		(beverages, kitchen supplies, baby supplies, etc.)
	Entertainment (month)		(dining out, movies/theater, fitness, hobbies, books/magazine subscription, etc.)
Spousal and Child Support	Child Support/Alimony (month)		
<u>Education</u>	School Supplies (month)		
<u>Medical</u>	Insurance [medical, dental, pet, etc.] (month)		(any out-of-pocket cost)
	Auto Ioan (month)		(if not on credit report)
Auto	Auto insurance (month)		(total for all auto insurance policies)
	Auto Fuel/Transportation Cost (month)		
	Insurance [medical, dental, pet, etc.] (month)		(any out-of-pocket cost)
	Home maintenance contracts [lawn care, pest control, etc.] (month)		
<u>Other</u>	Clothing/Personal care (month)		(work clothes, work out, accessories, shoes, hair care, pedicures, etc.)
	Child care / Child activities (month)		(nanny, daycare, preschool, lessons, camp, sports, etc.)
	Tobacco and/or Alcohol (month)		
	Any other out-of-pocket monthly cost		

C	Co-Applicant Name:		
	Out-of-Pocket Aver	age Expense Cate	gories
Category	Expenses	\$	Examples/Additional info
	Mortgage (P+I)		(if not on credit report)
	Property tax payment (annual)		(if not in mortgage payment)
Mortgage#1	HOA (annual)		(if not in mortgage payment)
	Home Owners Insurance (annual)		(if not in mortgage payment)
	Mortgage (P+I) [Rental]		(if not on credit report)
NAcutacae#2	Property tax payment (annual)		(if not in mortgage payment)
Mortgage#2	HOA (annual)		(if not in mortgage payment)
	Home Owners Insurance (annual)		(if not in mortgage payment)
	Alarm system/Cable/Internet (month)		
	Phone Services [cell, home] (month)		
	Utilities [Water, garbage, sewage] (month)		(if not included in tax bill)
<u>Household</u>	Electricity (avg bill month)		
	Groceries (month)		(beverages, kitchen supplies, baby supplies, etc.)
	Entertainment (month)		(dining out, movies/theater, fitness, hobbies, books/magazine subscription, etc.)
Spousal and Child Support	Child Support/Alimony (month)		
<u>Education</u>	School Supplies (month)		
<u>Medical</u>	Insurance [medical, dental, pet, etc.] (month)		(any out-of-pocket cost)
	Auto Ioan (month)		(if not on credit report)
	Auto insurance (month)		(total for all auto insurance policies)
<u>Auto</u>	Auto Fuel/Transportation Cost (month)		
	Insurance [medical, dental, pet, etc.] (month)		(any out-of-pocket cost)
	Home maintenance contracts [lawn care, pest control, etc.] (month)		
Ouhan	Clothing/Personal care (month)		(work clothes, work out, accessories, shoes, hair care, pedicures, etc.)
<u>Other</u>	Child care / Child activities (month)		(nanny, daycare, preschool, lessons, camp, sports, etc.)
	Tobacco and/or Alcohol (month)		
	Any other out-of-pocket monthly cost		

### **Pre-finance Questionnaire**

	rie-infance Questionnaire
Primary appl	icant name:
Address of th	ne property:
	per (main contact):
	,
Instructions: To	finalize the application process, either go to <a href="https://www.surveymonkey.com/r/ZZSP6HN">https://www.surveymonkey.com/r/ZZSP6HN</a> directly to complete this
SELF Pre-finance	e Questionnaire or visit our website and click on the Pre-Finance Questionnaire link. <u>If you do not have access to a</u>
	uter, please complete the form below and submit with your application via mail, office drop-off, or give to your SELI
<u>Loan Officer</u> :	
\ \ \\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\	anamentad usu ta saali aun samiisaa?
-	orompted you to seek our services? e at least 1)
,	High utility bill
_	Leaking/ Damaged roof
0	
	Interested in "Green" technologies (renewable energy and environmental awareness)
$\circ$	
0	,
0	Reduce home insurance cost
$\circ$	Other:
	aspects of your life do you feel would improve if given access to SELF financing?
	ions: Each given aspect must contain a different level of importance rating, no duplicate ratings. Choose in order of
-	ance, <u>1 (most important) to 7 (least important)</u> .] *If "Other" is not an option, enter '7' for that answer. <b>(All 7 answer</b> se a different number for each one.)
require	e a anjierent namber jor each one.)
	Safety (Home structure safety such as roof was caving in or leaking)
	Security (Impact windows, doors)
	Health (cleaner, cooler air - no mold or mildew)
_	Cost of Home Insurance
_	Cost of energy and/or water bills
_	Quality of life in home
	OU.
_	Otner:
	id you select SELF for your home improvement project?
-	e at lease one.)
(CHOOS	e at lease one.)
	Unable to obtain other sources of financing
	Lower interest rates than other available offers
_	I trust SELF as a Community Development Financial Institution (CDFI)
_	SELF is a non-profit
_	Project Management
_	It was highly recommended to me
_	
_	Other:

#### **Loan Summary Information Form**

Solar and Energy Loan Fund (SELF) has a unique underwriting process. We do not primarily look at your credit score for making final decisions on approvals; we look at the whole picture. Please answer the following questions as a part of the application submission. This information will help the underwriting team make a pre-approval or final decision in a timely manner.

1.	How long have you lived in your home?
2.	Is the home you wish to retrofit a rental home?
3.	Tell us about your current position (primary and co-signer [if applicable]) at your job, including job title, or indicate "retired if applicable:
4.	Please tell us more about how you heard about our program:
	a. *If a Contractor(s) referred you to the program, please enter the total estimate amount(s) here and provide a copy of the quote(s) along with your application, if given. \$
5.	Please tell us more about the impact this home improvement will have on you and/or your family:
6.	Do you have any debt in collections or a private mortgage? If yes, please explain:
7.	<ul> <li>a. IF you have a Private Mortgage, please include the most current mortgage statement providing the monthly payment and remaining balance of the mortgage.</li> <li>If applicable, what have you done to resolve these issues, or what are your plans to resolve them?</li> </ul>
8.	Could you provide a co-signer if it is required by the Underwriting Department?
ired: . Do	o you have homeowner's insurance?
	a. If No, has your homeowner's insurance lapsed more than 30 days?
. Но	ow much is your current <u>annual</u> homeowner's insurance premium for the home you wish to retrofit?
_	

# **Emergency Contacts**

*Please provide two (2) emergency contact name to be filed if the SELF Loan is closed and home in Contacts must be different than the applicant(s)	mprovements are financed. *Emergency
Contact Name 1 (please print legibly)	 Phone#
Contact Name 2 (please print legibly)	 Phone#

	Sc	Solar and Energy	Loan Fund Ra	nd Energy Loan Fund Rate Sheet - Residential	ential	
	Energy Efficiency (EE) Improvements	Renewable Energy (RE) Improvements	Wind Hazard Mitigation	Water Conservation	ADA Products	Definitions and Examples
100% up-front financing of improvement		up to	up to amount qualified to borrow	ow		
Rates			5.00% - 9.50%			Energy Efficiency: Improvements to a facility, building or process that reduces energy
Amount		Mini	Minimum Ioan allowed: \$1,000	00		consumption, or reduces energy consumed per
Seared or Unseared			Unsecured			square foot. (i.e., A/C units, LED Lights, Weatherization Insulation)
Term		3 - 10 years (based o	10 years (based on loan amount and available funding terms)	able funding terms)		
Fees:						Renewable Energy:
Energy Assessment Fee:		Energy Assessments	Energy Assessments are optional - Contact SELF for information.	LF for information.		Solar Water Heaters, Solar Pool Pumps, Photovoltaic Panels [PVJ, Solar Attic Fans, Solar A/C, Solar Pool Heater.
Loan Closing Costs [rolled into the loan]:	1)Processing Fee: 2% (discounted to 2)Project Management Fee: 2.5%; 3)FL Doc Stamp Fee: \$.35 per \$100;	1)Processing Fee: 2% (discounted to 1% for veterans); 2)Project Management Fee: 2.5%; 3)FL Doc Stamp Fee: \$.35 per \$100;	;; ; ; ; ; ; ; ; ; ; ; ; ; ; ; ; ; ; ;	111111111111111111111111111111111111111		Wind Hazard Mitigation: An inspection that may
	4 Jr L Uniform Commercial Code (UC 5)Origination Fee: \$20; 6)Recording Fee: \$50 <b>[if applicable]</b>	4.)FL Uniform Commercial. Code (UCL) ree: \$40 and up, based on # of signers. <i>Iff applicable)</i> ; 5)Origination Fee: \$20; 6)Recording Fee: \$50 <i>[iff applicable]</i>	, based on # or signers. <i>U</i>	ј аррисавеј;		quality a property for discounts on windstorm insurance. (i.e., Roof Straps, Reinforced Garage Doors, Windows, Window Shutters, Doors, etc.)
Penalty for early pay-off			none			
Property appraisal required			ou			Wothou Concountions
Equity required			OU			Irrigation System, Rain Barrels/Cisterns, Water
Underwriting process			*24 hours - 1 week			Meters, Low Flow Toilets/Shower Heads/Aerators,
Repayment begins		- 08	30 - 45 days after Ioan closing	BL		ell.
Military Discount (active and inactive)		50% off the pro	50% off the processing fee (valid military ID required)	y ID required)		Americans with Disabilities Act (ADA) Products:
Other information	Homeowner must be the primary a	primary applicant. Contract app	ractors must be chosen from SE apply regarding mobile homes.	pplicant. Contractors must be chosen from SELF's Approved Contractor List. Some restrictions apply regarding mobile homes.	List. Some restrictions	Following the Standards for Accessible Design. Some products include: wheelchair ramps, bath tubs, railing, etc.
* The underwriting and interest rate decision is based on aredit score, sufficient	sion is based on credit score,	sufficient income documento	ation, and file support documer decision may take more time	umentation. If the Underwrit <b>time</b> .	er and/or Internal Credit (	income documentation, and file support documentation. If the Underwriter and/or Internal Credit Committee require more documentation, the final decision may take more time.
Solar and Energy Loan Fund (S	2400 Rhode Island A SELF) is a certified Communi	2400 Rhode Island Avenue, Fort Pierce, FL 34950 <b>Mailing Address</b> : P.O. Box 5506, Fort Pierce, FL 34954 <b>O</b> : 772-468-1818 <b>F</b> : 772-468-1811 a certified Community Development Financial Institution (CDFI). For more information about a CDFI, please reference https://ww www.solarenergyloanfund.org	Mailing Address: P.O. Box 5506, For stitution (CDFI). For more inforwww.solarenergyloanfund.org	506, Fort Pierce, FL 34954 <b>0</b> : 7 information about a CDFI, p. 1d <u>.org</u>	72-468-1818 F:772-468-18  ease reference https://	2400 Rhode Island Avenue, Fort Pierce, FL 34950 Mailing Address: P.O. Box 5506, Fort Pierce, FL 34954 O: 772-468-1818 F: 772-468-1811 Solar and Energy Loan Fund (SELF) is a certified Community Development Financial Institution (CDFI). For more information about a CDFI, please reference https://www.cdfifund.gov/Pages/default.aspx