

RESIDENTIAL LOAN CERTIFICATION

To be used for Reservation, Project Pre-Approval, or Loan Enrollment

Participating Financial Institution or Participating Finance Lender Information

PFI/PFL Name: _____

PFI/PFL Program Participation ID#: _____ Program ID#: 1220

PFI/PFL Internal Loan ID#: _____

CHEEF Loan ID# (for projects that have received Pre-Approval): _____

Loan Officer Name: _____

Business Phone: _____ Business Email Address: _____

Please select one of the following Certifications:

Loss Reserve Reservation Request Certification (*complete Section 1*)

Loss Reserve Reservation and Project Pre-Approval Certification (*complete Section 2*)

Loan Enrollment Certification (*complete Section 3*)

Section 1. Loss Reserve Reservation Request Only

(ad) This loan is being made to a borrower with Low-to-Moderate Income, as defined in Section 10091.1 (bb) of the Program regulations: Yes No

(ae) Anticipated Claim-Eligible Principal Amount: \$ _____

(af) Anticipated Total Principal Amount: \$ _____

(i) Gas Utility: PG&E SCE SDG&E SoCalGas Other _____

(j) Electric Utility: PG&E SCE SDG&E SoCalGas Other _____

I, the undersigned, hereby certify that this Loss Reserve Reservation request is made in accordance with the Program regulations, and the information provided is true and accurate to the best of my knowledge.

(ag) Authorized Signature: _____ (ah) Date: _____

(ai) Printed Name: _____ (aj) Title: _____

Note: If a PFI or PFL fails to enroll an Eligible Loan corresponding to a Loss Reserve Reservation in accordance with Section 10091.8 within one hundred eighty (180) calendar days of the reservation approval the Executive Director may allow a sixty (60) calendar day extension of a reservation upon a written request from a PFI or PFL. The Authority's approval of a Loss Reserve Reservation request is only valid if all other regulatory requirements are met upon final loan enrollment. Loss Reserve Reservations are not valid beyond the Program's expiration.

Section 2. Loss Reserve Reservation and Project Pre-approval Request

Required Enclosures:

1. An estimate Itemized Invoice
 2. An executed Customer Data Release Form provided for each Investor Owned Utility providing service to the Eligible Property covering each meter and fuel provided
 3. Executed Part 1 of REEL Borrower Form
 4. Utility bill(s) for the IOU(s) servicing the property from within 60 days of the date on this application
 5. Completed Lender Entry portion of the Loan Enrollment Workbook for project Pre-Approval;
- OR-
6. Complete the following:
 - (ad) This loan is being made to a borrower with Low-to-Moderate Income, as defined in Section 10091.1 (bb) of the program regulations: Yes No
 - (ae) Anticipated Claim-Eligible Principal Amount: \$ _____
 - (af) Anticipated Total Principal Amount: \$ _____
 - (i) Gas Utility: PG&E SCE SDG&E SoCalGas Other _____
 - (ak) Gas Utility Account # (for IOU accounts): _____
(first 10 digits only)
 - (j) Electric Utility: PG&E SCE SDG&E SoCalGas Other _____
 - (al) Electric Utility Account # (for IOU accounts): _____
(first 10 digits only)

Note: If a PFI or PFL fails to enroll an Eligible Loan corresponding to a Loss Reserve Reservation in accordance with Section 10091.8 within one hundred eighty (180) calendar days of the reservation approval the Executive Director may allow a sixty (60) calendar day extension of a reservation upon a written request from a PFI or PFL. The Authority's approval of a Loss Reserve Reservation request is only valid if all other regulatory requirements are met upon final loan enrollment. Loss Reserve Reservations are not valid beyond the Program's expiration.

Please indicate who will complete the work:

Qualified Contractor

- (a) Qualified Contractor Business Name: _____
- (b) CSLB #: _____

-OR-

Self-Installer

Please Sign:

I, the undersigned, hereby certify that this Project Pre-Approval request is made in accordance with the Program regulations, and the information provided is true and accurate to the best of my knowledge.

- (ag) Authorized Signature: _____ (ah) Date: _____
(ai) Printed Name: _____ (aj) Title: _____

Section 3. Loan Enrollment

Required Enclosures:

To enroll an Eligible Loan a PFI or PFL must submit the following documents to the Authority:

1. Loan Enrollment Workbook including the following tabs:
 - a. Itemized Invoice
 - b. Lender Entry Screen
2. Certificate of Completion or Self-Installer Project Submission
3. Executed Customer Data Release Form for each Investor Owned Utility providing service to the property covering each meter and fuel provided
4. Executed REEL Borrower Form
5. Utility bill(s) for the IOU(s) servicing the property from within 60 days of the date on this application
6. For Self-Installers, written proof of purchase for the Eligible Improvements, e.g., a copy of the receipt.
7. For Finance-Only Projects installing EEEMs that require modeling, a summary of the modeling documentation indicating the expected energy savings and the name of the software used.

Certifications of the Participating Financial Institution or Participating Finance Lender

Pursuant to Section 10091.8 of the Program regulations, by submitting this Loan Enrollment Application,
_____ (ao) certifies that:

(Name of PFI or PFL)

1. The loan is an Eligible Loan as defined in Section 10091.1(r) of the Program regulations.
2. The Borrower receiving the Eligible Loan meets the Minimum Underwriting Criteria set forth in Section 10091.4 of the Program regulations.
3. The requested Enrolled Loan amount is not financing distributed generation.

I, the undersigned, hereby certify that all of the information provided in this application is true and accurate to the best of my knowledge.

(ag) Authorized Signature

(ah) Date

(ai) Printed Name

(aj) Title