**LOAN ENROLLMENT APPLICATION**

<table>
<thead>
<tr>
<th>Participating Financial Institution or Participating Finance Lender Information</th>
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<tbody>
<tr>
<td>PFI/PFL Name: ____________________________  PFI/PFL ID#: ____________________________</td>
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<tr>
<td>Loan Officer Name: ____________________________</td>
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<tr>
<td>Business Phone: ____________________________  Email Address: ____________________________</td>
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**Borrower Information**

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

Total Debt-to-Income (DTI) Ratio:  
☐ under 25%  ☐ 25%-35%  ☐ 36%-45%  ☐ 46%-55%

Annual Borrower Income:  
☐ less than $25,000  ☐ $25,000-$34,999  ☐ $35,000-$49,999  ☐ $50,000-$74,999  
☐ $75,000-$99,999  ☐ $100,000-$149,999  ☐ $150,000 or more

FICO Score:  
☐ 580-640 (income verification required)  ☐ 641-700  ☐ 701-760  ☐ 761-820  
☐ 821 or higher  ☐ No FICO

**Property Information**

Number of Units for which Eligible Improvements were undertaken: ____________________________

Property Type:  
☐ Owner-occupied  ☐ Rented or leased

Gas Utility:  
☐ PG&E  ☐ SCE  ☐ SDG&E  ☐ SoCalGas  ☐ Other ____________________________

Gas Utility Account #: ____________________________  
(Not applicable if “other”)

Electric Utility:  
☐ PG&E  ☐ SCE  ☐ SDG&E  ☐ Other ____________________________

Electric Utility Account #: ____________________________  
(Not applicable if “other”)

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Loan Information

Loan Identification Number: _______________________________ Loan Amount: $_______________________
(If a project reservation or pre-approval was used, use Unique Program ID #)

Was a reservation used for this loan?  Yes  No  Was this project Pre-Approved?  Yes  No
Type of Loan:  Term Loan  Retail Installment Contract
Interest Rate: ________%  Fixed  Variable  Date the interest rate was finalized: _________________
Loan Term (months): _________________________  Maturity Date (MM/DD/YY): ____________________

Required Enclosures

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

1. Certificate of Completion or Self-Installer Project Submission
2. Executed Customer Data Release Form (if not already provided pursuant to a Project Pre-approval)
3. Executed CHEEF privacy rights disclosure
4. Itemized list of the Eligible Improvements described in sufficient detail to clearly identify the Eligible Energy Efficiency Measures, indicating whether measures are gas or electric, and the associated costs for each Eligible Improvement.

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, ________________________________ certifies that:

(Name of PFI or PFL)

1. The loan is an Eligible Loan as defined in Section 10091.1(n) 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.

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

__________________________________________  ______________________________
Authorized Signature  Date

__________________________________________  ______________________________
Printed Name  Title

CAEATFA Use Only

<table>
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<tr>
<th>Unique Program ID #</th>
<th>Loan Loss Reserve Contribution (%)</th>
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Authorized Signature  Date