



Attracting private capital to Northeast Ohio for public good!

***JOBS AND INVESTMENT FUND
(BOND FUND)
PROJECT APPLICATION***

1. Applicant Company/User

Company or Project Name _____

Street Address _____

City _____ State _____ Zip _____

Federal Tax Identification Number _____ NAICS/SIC Code _____

Contact Person _____ Title _____

Telephone (office) _____ Cell Phone _____

E-mail _____ Fax _____

Web site _____

2. Principal Officers/Owners only if company is privately held (10% ownership or more)

1.) Name and Title _____

Percent of Ownership _____ Social Security # _____ Ever filed for bankruptcy? _____

2.) Name and Title _____

Percent of Ownership _____ Social Security # _____ Ever filed for bankruptcy? _____

3. Information on Existing Business (Attach additional information/brochures if necessary)

Type of Business _____ Date Established _____

Principal Product/Service _____

Number of: Full Time Employees _____ Part Time Employees _____

Payroll: Full Time Employees \$ _____ Part Time Employees \$ _____

Benefits (check all that apply): Health Care ___ 401K match ___ Other _____

Bank References – (List banks in which business has existing accounts.)

1.) Bank Name _____

Contact _____ Phone Number _____

2.) Bank Name _____

Contact _____ Phone Number _____

3.) Bank Name _____

Contact _____ Phone Number _____

4. Description of Proposed Project

Location _____

Address _____

City/Village/Township _____ County _____

If relocation, please indicate from where _____

Within 3 years of completion, how many full time & part time jobs will be created and payroll for each?
 Full time _____ \$ _____ Part time _____ \$ _____

How many employees do you have at this location? _____ How many in the State of Ohio? _____

Project Description (attach additional pages if necessary) _____

Projected Project Start Date: _____ Projected Completion Date: _____

Construction Jobs Created: _____ Estimated Construction Payroll \$ _____

5. Project Budget

Project Costs

Land \$ _____

Building \$ _____

Machinery/Equipment \$ _____

Other (if applicable) \$ _____

_____ \$ _____

_____ \$ _____

Total Project Costs \$ _____

Project Funding

Owner Equity (min. 10% of project) \$ _____

Development Finance Authority Funding (desired) \$ _____

Other (if applicable) \$ _____

_____ \$ _____

_____ \$ _____

Total Project Funding \$ _____

If any of the identified project costs will be to improve energy efficiency (e.g. lighting, windows/doors, roof/solar panels), what are the costs associated for those improvements? \$ _____

6. Documentation

For a *BOND FUND* transaction, the following information must be submitted with your Project Application to receive consideration:

- Three (3) years of historical, Financial Statements (balance sheet, P & L)
- Most current Interim Financial Statements (not more than 90 days old)
- Brief history of existing business
- Any other information that you feel will assist in the review of your project

Additional information will be required during due diligence process.

7. Equal Opportunity

All programs of the Development Finance Authority of Summit County (DFA) are offered on a nondiscriminatory basis, without regard to race, color, national origin, religion, sex, age or disability.

8. Application Fee Schedule

All application fees are payable upon submission of application and are non-refundable. Please contact DFA staff to determine application fee. Additional fees apply upon issuance/closing of the bonds.

9. Submission Acknowledgment

As an authorized agent of the Applicant Company, I hereby submit this Project Application. I understand that any false statement in this record may subject the Applicant Company and signer to criminal prosecution. I understand that additional information will be required. I also understand that this document in no way constitutes a commitment of funds by the Development Finance Authority of Summit County and any of its loan programs.

Signature

Printed name, Title

Date