



**PROPERTY ASSESSED CLEAN ENERGY PROGRAM
DOCUMENT CHECKLIST
APPLICATION NUMBER _____**

1. The following documents should be submitted to apply for participation in the PACE Program:

- a. Application completed by the owner (the “Property Owner”) of the Real Property where the Qualified Improvement will be installed (the “Project”) [VIEW](#)
- b. Property Owner Certification [VIEW](#)
- c. Copy of the most recent property tax bill or statement of assessed value or Appraisal District Property ID number for the Real Property
- d. If it is not determinable from the Appraisal District website that all property taxes have been paid when due with respect to the Real Property, a tax certificate or other acceptable evidence from local Tax Assessor showing property taxes that are due and owing with respect to the Real Property have been paid
- e. If the Property Owner is a legal entity, Certificate of Fact from the Texas Secretary of State's Office showing entity in existence [VIEW](#)
- f. If the Property Owner is a legal entity, Certificate of Account Status from the Texas Comptroller of Public Accounts [VIEW](#)
- g. If there are one or more mortgages existing on the Real Property, (i) name and contact details for each such mortgage holder, (ii) outstanding amount of indebtedness owed to each such mortgage holder, and (iii) evidence that the Lender Consent Form has been sent to each such mortgage holder (at least 30 Days Prior to PACE Project funding) [VIEW](#)

2. The following will be required prior to closing a financing under the PACE Program:

- a. Owner Assessment Contract
- b. Capital Provider (Lender) Contract
- c. Capital Provider (Lender) Certification [VIEW](#)
- d. Consent of Lender(s) (if applicable) to financing under PACE Program [VIEW](#)
- e. Notice of Contractual Assessment
- f. Property Title Report prepared by Title Insurance Company
- g. [PACE Reporting Request Form] [VIEW](#)
- h. Copy of loan documents between Capital Provider and Property Owner
- i. Description of the Project and list of all Qualified Improvements, including evidence of the useful life of all such Qualified Improvements and review/report of the [water][and][energy] baseline conditions and the projected [water][and][energy] savings [VIEW](#)
- j. Budget for the Project
- k. ITPR Statement of Compliance (Before) [VIEW](#)
- l. If the Property Owner is a legal entity, either (i) a legal opinion from legal counsel acceptable to the Program Administrator with respect to the enforceability of the documents executed by the Property Owner in connection with the PACE Program, or (ii) the Property Owner's Organizational Documents, applicable consents or resolutions and certificates of incumbency with respect to any person executing documents on behalf of the Property Owner under the PACE Program.

3. The following may be required for final approval of a financing under the PACE Program:

- a. Copies of Permits (If Required)
- b. Approved Request for SIR Variance (If Required) [VIEW](#)
- c. Copy of Appraisal (Within 12 Months)

4. The following will be required post-construction for final project completion:

- a. ITPR Statement of Compliance (Post-Completion) [VIEW](#)
- b. Other items requested by the Program Administrator