

## PROPERTY ASSESSED CLEAN ENERGY PROGRAM

### REQUIRED DOCUMENTS CHECKLIST

*Each document must be dated within 90 days of the closing date unless otherwise indicated.*

**The following are required as part of the initial PACE application document review process:**

- 1. Property Owner Certification ★  
*Individual and entity executing must match #3 and be signatory of #15, #16, #17, and #18*
- 2. [Certificate of Fact from the Texas Secretary of State's Office](#) showing entity in good standing
- 3. Draft Certificate of Incumbency, Consents, and Company Organizing Documents (Authorizing Signatory) ▲\*  
*Individual and entity executing must match #1 and be signatory of #15, #16, #17, and #18*
- 4. Verification of [Franchise Tax Account Status from the Texas Comptroller of Public Accounts](#) ◆
- 5. Most recent Central Appraisal District Property Search Details ◆
- 6. Verification from local Tax Assessor entity showing property taxes are current ◆  
*If closing in January, must show payment of property taxes due on January 31<sup>st</sup>*
- 7. Capital Provider Certification ★  
*Entity executing must be signatory of #15, #16, and #18*
- 8. Required Capital Provider Information Form ▲★
- 9. Sources and Uses of PACE Funds *and* Payment Schedule ▲★  
*Both Excel and PDF versions required*

**The following are required as part of the PACE application document review process and must be submitted a minimum of 5 business days before the target closing date:**

- 10. Feasibility study or energy audit  
*Must be dated within 3 years of the closing date*
- 11. Signed and Sealed Independent Third Party Reviewer (ITPR) Pre-Construction Verification Certificate ★
- 12. PACE ITPR Workbook ★  
*Both Excel and PDF versions required*
- 13. List of contractors and subcontractors or executed service contracts and agreements
- 14. Property Title Report prepared by Title Insurance Company ★  
*Property description must match #15 and Report must be dated within 30 days of the closing date  
Ownership must match #1, unless transaction includes purchase of the Property*

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15. Draft PACE Owner Contract, PACE Lender Contract, and PACE Notice of Contractual Assessment Lien ▲★\*  
*Final version must be notarized*  
*May use target loan amount in brackets prior to closing, as long as same amount is used in the following documents: #3, #8, #9, #16, and #18*  
*Payment schedule must have column heading "Admin. Fees" to match contract term*  
*Property description must match #14*  
*Individuals and entities executing must match #1, #3, #7, #16, #17, and #18*
16. Draft Financing Documents ▲★  
*May use target loan amount in brackets prior to closing, as long as same amount is used in the following documents: #3, #8, #9, #15, and #18*  
*Individuals and entities executing must match #1, #3, #7, #15, #17, and #18*

**The following will be required as part of the PACE application document review process, when applicable. These documents must be submitted a minimum of 5 business days before the target closing date:**

17. Lender Consent to PACE Assessment Form ★\*  
*Only required if there is an existing mortgage lien or one will be created contemporaneously at closing*  
*May insert maximum potential loan amount, in lieu of actual loan amount*  
*Property Owner (individual and entity) executing must be notarized and match #1, #3, #15, #16, and #18*
18. Variance of Loan to Value (LTV) Request Form ▲★  
*Only required if not using CAD assessed value from #5*  
*Individuals and entities executing must match #1, #3, #7, #15, #16, and #17*
19. Appraisal of Property  
*Only required if #18 requested*  
*Must be dated within 18 months of the closing date*

**The following will be required post-construction as part of the PACE application document review process for final project completion:**

20. Signed and Sealed Independent Third Party Reviewer (ITPR) Post-Construction Statement of Compliance  
*May be the same or a different ITPR than #11*
21. Property Owner Post-Project Certification  
*May be a different Property Owner than #1 if there was a sale or transfer*
22. TPA/HARC PACE Reporting Request Form
23. TPA Case Study Submission

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- Draft documents to be executed at closing marked with "▲". The actual loan amount may change prior to closing on the PACE financing but must be consistent in each draft document.
  - A screenshot is acceptable for items with "◆".
  - In instances of a post-construction financing or amended assessment, items with "★" must be updated and will be required as part of the PACE application review process. Additional documentation may be requested.
  - Documents that must be notarized marked with "\*"

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