

STATE HISTORIC REHABILITATION TAX CREDIT
SECTIONS 1, 2 AND 3 INITIAL PROJECT APPLICATION



Table with 4 columns: Note, FY, Q ORDER, OHP No., NPS No.

1. Historic Property Name: Street: City: County: Zip: Name of Historic District to which property contributes: [] California Register District [] California Register Property [] federal Part 1 application submission

2. Project Contact (if different from applicant) Name: Company: Street: City: State: Zip: Phone: Email Address:

3. Applicant I attest that the information I have provided is, to the best of my knowledge, correct, and that: [] I am the owner of the above-described property... [] if I am not the fee simple owner... [] has no objection... I understand that willful falsification of this application is considered a felony under California Penal Code Section 115... Name: Signature: Date: Applicant Entity: Street: City: State: Zip: Phone: Email Address: continued on next page

OHP Official Use Only Section 1

The OHP has reviewed the Initial Application Section 1 for the property above and has confirmed it:

- [] is listed individually or contributes to the above-named district on the California Register and is a "certified historic structure" for rehabilitation purposes.
[] is not listed on the California Register or has been determined as a non-contributor to a District.

Date [] OHP Comments attached Julianne Polanco, State Historic Preservation Officer

OHP Official Use Only Section 2

The OHP has reviewed the Initial Application Section 2 for the above-named property and has determined that:

- [] the rehabilitation described herein is consistent with the historic character of the property and/or with the district in which it is located and that the project meets the Standards for Rehabilitation. This letter is a preliminary determination only, since formal certification of rehabilitation can be issued only to the owner after rehabilitation completion.
[] the proposed rehabilitation will meet the Standards for Rehabilitation if the attached conditions are met.
[] the rehabilitation described herein is not consistent with the historic character of the property or the district in which it is located and that the project does not meet the Standards for Rehabilitation.

Date Julianne Polanco, State Historic Preservation Officer

[] OHP Comments attached



4. Section 1 Confirmation of California Register Listing [type 'X' in applicable boxes]

- The building contributes to the significance of the above named historic district or is individually listed in the California Register for rehabilitation purposes.
- Documentation that the building is submitted for a Federal Tax Credit Part 1 "Evaluation of Significance" and will continue state review once signed and returned by the NPS.
- Documentation of California Register listing or approved signed Federal Part 1 form is attached.

Part 1 received by OHP: _____
 Part 1 approved by NPS: _____ NPS No. _____

5. Section 2 Determination of Significance [type 'X' in applicable boxes]

- There are multiple buildings on the property. Describe their significance in the Section 2 Narrative.
- Buildings on the property are functionally related. Describe related functionality in the Section 2 Narrative.

6. Section 2 Project Data (for phased projects, data entered in this section must be totals for entire project)

Estimated total cost: _____ Estimated total rehabilitation costs (QRE): _____
 Number of buildings in project: _____ Floor area before/after rehabilitation _____ / _____
 Start date (estimated): _____ Completion date (estimated): _____
 Application includes ___ phase(s) Use before/after rehabilitation: _____ / _____
 # of dwelling units before/after rehabilitation: _____ / _____
 # of low-moderate income dwelling units before/after rehabilitation: _____ / _____

7. Application category and fee

Select one category:	Total estimated fee:	Due with Initial Application:
<input type="checkbox"/> Qualified residence	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> I attest that I own and occupy, or will occupy within two years, the subject qualified residence, and that my modified adjusted gross income is \$200,000 or less.		
<input type="checkbox"/> Qualified rehabilitation expenditure under \$1,000,000	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Qualified rehabilitation expenditure \$1,000,000 or more	<input type="text"/>	<input type="text"/>

8. 25% Bonus Criteria

Select which criteria are used to qualify for a 25% bonus credit. Qualification requirements are in the Instructions.

- Federal surplus property obtained through local agency under Government Code 54142
- Surplus state real property defined by Government Code 11011.1 Transit-oriented development
- Surplus land defined by Government Code 54221(b) Affordable housing for lower income households
- Designated census tract defined by Government Code 17053.73(b)(7) Military base reuse authority as per Government Code Title 7.86

9. Section 3 Applicant Tax Identification Number:

Applicant from number 3 above tax ID: TIN _____ SSN _____

CTCAC Official Use Only Section 3

(20%)(25%)of the estimated QRE listed in number 6 above: Processing Fee:

 Date Executive Director, CTCAC

