

Pennsylvania Housing Finance Agency

PHARE (HTF, RTT & MS) Without PennHOMES Commitment Checklist

Name of Development:

TC Number:

PHFA Number:

Description	Received Date	Date Forward	TS	FA	LG	MR	SA
1 Monthly Status Reports							
2 Technical Services Submission							
Plans and Specifications							
Enterprise Green Communities Checklist							
ResCheck/HERS reports (if applicable)							
Passive House Documentation (if applicable)							
State Historic Preservation Office (SHPO) Approval (if applicable)							
Phase I Environmental (CD)							
Phase II Environmental (if applicable)							
HTF - Environmental Compliance Checklist							
Alta Survey and Closure Report, signed and sealed by Surveyor.							
Surveyor's Report, signed and sealed by Surveyor							
Legal Description prepared by Surveyor							
Final Construction Cost Estimate							
Environmental Review (Required for PHARE HTF only)		PHFA Completes					
*** Please see Tab 6 of the Architect's Submission Guide for Closing Requirments***							
3 Certification Project is providing Broadband (if applicable)							
4 Current Energy Rebate Analysis							
5 Evidence of Zoning if not previously submitted							
6 Insurance Quotes:							
Construction Period							
Operating Period							
Flood Insurance							
7 Breakdown of Rent Up Expense							
8 Breakdown of Furnishings							
9 Ownership Entity Organizational Documents:							
If Limited Partnership:							
Certificate of Limited Partnership (filed with PA Dept. of State)							
Limited Partnership Agreement							
Organizational Documents of General Partner							
If Limited Liability Company:							
Certificate of Organization (filed with PA Dept. of State)							

	Operating Agreement							
	Organizational documents of member/managers							
	If General Partner or Manager or Member is Corporation:							
	Articles of Incorporation							
	Bylaws							
	Foreign Registration Statement (filed with PA Dept. of State)(if applicable)							
	501 (c)(3) determination letter (if applicable)							
	CHDO designation* (if applicable)							
	If General Partner or Manager or Member is Limited Liability Company							
	Certificate of Organization							
	Operating Agreement							
	Foreign Registration Statement (filed with PA Dept. of State)(if applicable)							
10	Current Equity Commitment Letter (including Pay-in and Draw Schedule)							
11	Draft Limited Partnership Agreement							
12	Final Site Control							
13	Owner/Applicant(s) Audited Financial Statements							
14	Funding Commitment Letters							
15	AHAP Contract (if applicable) - Project Based Assistance Commitment							
16	Subsidy Layering Review (if applicable)							
17	Management Plan							
18	Lease with Accessible Units Addendum							
19	Marketing/Tenant Selection Plan							
20	Affirmative Fair Housing Marketing Plan w/PHFA Addendum							
21	Income Certification of Existing Tenants (if applicable)							
22	Copy of Management Agent Broker License							
23	Supplemental Rental Housing Set Up Report (HTF Only)							
24	Supplemental Rental Housing Completion Report (HTF Only)							

PHFA Completes

PHFA Completes

Targeting Closing Date _____

Submitted by _____

Date _____

Distribution Key	
TS	Technical Services (Give everything to Kristy Provost to log in & she will distribute)
FA	Financial Analyst
MR	Management Representative
LG	Legal

SA	Staff Auditor (Angela Harris-Reider)
CG	Chrissy Gerbig