

PROPERTY ASSESSED CLEAN ENERGY PROGRAM

REQUIRED DOCUMENTS CHECKLIST

The following may be required as part of the PACE application review process:

- ☐ Signed Owner Certification
- ☐ Completed Project Pro Forma Model
- ☐ Copy of the Property tax bill and/or Travis Central Appraisal District Property ID number
- ☐ Copy of feasibility study and/or energy audit (If not Fast Track)
- ☐ Certificate of Fact from the Texas Secretary of State's Office showing entity in good standing
- ☐ Certificate of Account Status from the Texas Comptroller of Public Accounts
- ☐ Certificate of Occupancy
- ☐ Most recent Appraisal of Property (if available)

The following may be required for final project approval prior to closing

- ☐ Property Title Report prepared by Title Insurance Company
- ☐ Receipts of expenditures (To be included in PACE assessment)
- ☐ Appraisal of Property completed during prior 6 months (if required by Lender)
- ☐ Property zoning report which shows whether the property constitutes one or multiple lots for property tax purposes (if required by Lender)
- ☐ UCC-1 search reports for applicant from Texas Secretary of State and Travis County records (if required by Lender)
- ☐ Copy of most recent survey of the Property (if required by Lender)
- ☐ Consent Letter to PACE from Mortgagee (if applicable)

Office Use Only

Project ID _____

Received: _____

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REQUIRED DOCUMENTS INSTRUCTIONS

Document	Source
Appraisal	Owner provides appraisal (NOTE: Required if the PACE assessment exceeds 20% of the property's assessed value from County)
Property Title Report	Owner provides Property Title Report (No more than 1 month old)
Property Tax Bill	Owner provides most recent year's property tax bill
UCC-1 Search	Owner obtains from Texas Secretary of State and Travis County Clerk
Property Survey	Owner provides most recent survey
Certificate of Status	Owner obtains from Texas Secretary of State http://www.sos.state.tx.us/corp/sosda/index.shtml
Franchise Tax Account Status	Owner obtains from Texas Comptroller of Public Accounts https://mycpa.cpa.state.tx.us/coa/Index.html
Mortgagee Consent Letter	PACE Authority provides to owner to obtain mortgagee signature
Receipts of Expenditures	Owner provides all receipts after project completion