



Lee County Affordable Housing Program: School Impact Fee Reimbursement (SIFR) Non-Profit or Government Builder Application

Part I – Builder

1. Applicant / Builder Information:

- a) Agency Name: _____
- b) FEIN #: _____
- c) Address: _____
- d) Phone #: _____
- e) Contact Person Name: _____
E-Mail _____ Phone #: _____

2. Authorization (Please provide Name and Title of duly authorized applicant/builder representative):

- a) Name: _____
- b) Title: _____
- c) E-Mail: _____
- d) Signature: _____
- e) Date: _____

3. Status (Check only one):

- _____ Non-Profit 501(C) (3)
- _____ Non-Profit 501(C)(4)(A) and (B) and exempt from taxes under 5019(a)
- _____ Non-Profit 501(C)(20)
- _____ Government (Specify _____)

4. Attachments (only submit items not previously submitted, or items that need to be updated in County files):

- _____ Non-Profit Charter or similar document from the State of Florida
- _____ I.R.S. letter recognizing organization as a non-profit organization
- _____ Existing non-profits that have been in existence long enough to file federal taxes must include a
- _____ Copy of the latest federal tax return (such as IRS Form 990)
- _____ Copy of most recent audit and current financial statements

Part II – Project Information

1. **Cumulative Total Funds Requested:** \$ _____
 (Maximum \$100,000 per Non-Profit or Government Builders per County Fiscal year)
2. **Type of Housing to be Assisted with SIFR Funds:**

Please Check	Type of Housing
	Single Family (detached)
	Duplex
	Townhouse
	Multi-family Unit
	Other (specify type _____)

3. **Provide receipt showing paid impact fees (attach to application):**
- a) **Amount of School Impact Fees Paid:** \$ _____
- b) **Amount of School Impact Fee Reimbursement Requested:** \$ _____
4. **Attach all of the following:**
- _____ Copy of School Impact fee from Permitting Agency
- _____ Proof of Impact Fee Payment

Part III – Homeowner/Tenant Information:

1. **Name / Address / Location Information:**
- a) **Homeowner/Tenant Name(s):** _____
- b) **Address:** _____
- c) **Strap Number(s):** _____
2. **Financial Assistance Provided:** *Note: For rental projects this information may apply to more than one unit – if so, please specify the number of units in the project.*
- a) **Other Public Funds** (please specify amounts and sources): _____

Mortgage Position	Mortgage Holder	Amount	Recorded at Instrument #	Date Recorded
First				
Second				
Third				
Fourth				
Other				

c) Monthly Payment:

Homeowners – Mortgage Payment – Principal, Interest, Taxes and Insurance (PITI) \$ _____

Renters – Monthly Rent Payment – Rent plus Utilities \$ _____

3. Homeowners Only:

Owner/Buyer Contribution: \$ _____ Total Project Cost: \$ _____

Appraised Value: \$ _____ Purchase Price: \$ _____

4. Attach all of the following:

_____ Income Certification

_____ Third- Party Verifications

_____ Bank Statements (if applicable)

_____ Property Appraisal

_____ Agreement of Sale

_____ Final Settlement Statement

Lee County Affordable Housing Program: School Impact Fee Reimbursement (SIFR) Non-Profit or Government Builder Instructions

1. Provide a completed Lee County School Impact Fee Reimbursement application with the required attachments.
2. Eligibility Timeline:
 - a) The applicant has 365 days after the school impact fee is paid to provide all of the following:
 1. Certificate of Occupancy
 2. Completed Household Eligibility Form
 3. Proof of Ownership: Sales Agreement (homeowners) or Lease (rental Properties)
 4. In the case of homeownership, proof that the school impact fee reimbursement is shown in the closing statement under the section “amounts paid by or on behalf of the borrower”
 5. Property Appraisal

Failure to meet this deadline voids the applicant’s eligibility unless an extension is granted for good cause.
 - b) The applicant may request the County to issue a commitment for reimbursement with the condition that the applicant provides all the necessary documentation within a specific 45-day time period that falls within the 365 days after payment of the school impact fee. The commitment allows reimbursement funds to be factored in at the time of closing.
3. Reimbursements will be processed in the order they are found sufficient for review.
4. Eligible applicants: Non-Profit or Government affordable housing builders. If not already on file with the Affordable Housing Program, non-profit applicants must submit proof of non-profit status by submitting proof of one of the following:
 - a) Subsection 501(C)(3) of Chapter 26 of the U.S. Internal Revenue code as a corporation, a community chest, a fund, or a foundation, organized and operated exclusively for charitable purposes, or for prevention of cruelty to children, and is then exempt from taxes under Section 501(a) therein; or
 - b) Subsection 501(C)(4)(A) and (B) of Chapter 26 of the United States Internal Revenue Codas either a Civic League or an organization not organized for profit, is operated exclusively for the promotion of social welfare, and is exempt from taxed under Section 501(a) therein; or
 - c) Subsection 501(C)(20) of Chapter 26 of the United State Internal Revenue Code as an organization or trust, the exclusive funding of which is to form part of a qualified group legal services plan or plans within the meaning of Section 120 as referenced therein.