

Residential Loans Documents Checklist

PRE-APPROVAL REMINDER: All loan agreements must be signed by Tacoma Power before work begins.

BEFORE WORK BEGINS	LOAN				
	Heat Pump	Ductless Heat Pump	Windows	Insulation	Hybrid Water Heater
Residential Program Application • Signed and dated by owner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bid(s) • Signed by owner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Heat load calculation * required for whole home DHP	<input type="checkbox"/>	<input type="checkbox"/> *			
Balance Point Worksheet	<input type="checkbox"/>				
Document HSPF rating	<input type="checkbox"/>	<input type="checkbox"/>			
Statutory Warranty Deed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Knob & Tube Inspection Report • Required if Knob & Tube wiring is present				<input type="checkbox"/>	
Income Qualification Application (if applicable) • Signed by owner • Include applicable required documentation (proof of income, declaration of zero or unreported income, picture ID, birth certificate(s), etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unconditional Personal Guarantee (required for LLC applying for conservation loan)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AFTER WORK IS COMPLETE (submitted by contractor)					
AHRI certificate	<input type="checkbox"/>	<input type="checkbox"/>			
Insulation certificate				<input type="checkbox"/>	
Invoice for work • See invoice requirements	<input type="checkbox"/> **	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Window shipping slip			<input type="checkbox"/>		

**For broken heat pump replacement, include model number of broken heat pump or photo of broken heat pump nameplate with heat pump ID number