

**The Episcopal Diocese of Massachusetts**

Treasurer's Office  
 Diocesan Loan Committee Chair  
 138 Tremont Street  
 Boston, MA 02111

**DIOCESAN LOAN FUND / GREEN LOAN FUND COMMON APPLICATION**

**DATE OF APPLICATION:** \_\_\_\_\_

Church ID#: \_\_\_\_\_

Contact Person Name: \_\_\_\_\_

Church Name: \_\_\_\_\_

Address: \_\_\_\_\_

Street Address \_\_\_\_\_

Phone \_\_\_\_\_

City/Town/Zip \_\_\_\_\_

Email Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Senior Warden Name: \_\_\_\_\_

Treasurer Name: \_\_\_\_\_

Address: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_

Email Address: \_\_\_\_\_

<b>PROJECT BUDGET (est.)</b>	
<b>DIOCESAN LOAN FUND REQUEST</b> *Term Requested: <u>  </u> mo	
<b>GREEN LOAN REQUEST</b> *Term Requested: <u>  </u>	\$
<b>OTHER SOURCES</b>	\$
<b>TOTAL PROJECT FUNDING SOURCES</b>	

*\*Loans may be requested for terms up to 15 years*

**LOAN PURPOSE:** Describe the purpose of this loan and scope of work to be done. Also, do you believe the project is eligible for a Green Loan? (Attach separate page if needed)

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## **PLEASE ANSWER THE FOLLOWING QUESTIONS**

- Yes  No 1. Does parish have a Diocesan/Green loan? *Amount* \_\_\_\_\_ *Term* \_\_\_\_\_
- Yes  No 2. Is Diocese guarantor of any financial obligations? *Amount* \_\_\_\_\_
- Yes  No 3. Are Assessments paid in full to date? *If not, % paid?* \_\_\_\_\_
- Yes  No 4. Has the Parish Vestry approved this application?
- Yes  No 5. Has the request been submitted to the Deanery?
- Yes  No 6: Has the Parish completed a financial audit for the most recent year ended?

***If further explanation is needed, please add comments below. (Attach separate page if needed)***

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## **REQUIRED INFORMATION WITH THIS APPLICATION:**

*Please attach to this Application and label.*

- 1) Current year -to-date and prior 2 years financial statements (Statements of Income & Expense and Balance Sheet)
- 2) Projected parish budget
- 3) Project budget including fees and contingencies (please use template attached)
- 4) Contractor bids (at least two required)
- 5) Plot plan or a sketch of parish property
- 6) A vote of the Vestry authorizing this request.

## **Additional Information Required Prior to Close / Funding of a New Loan:**

*Not required as part of the Application for a loan.*

- 1) Provide a copy of the most recent Financial Audit including the Statement of Income & Expense and a Balance Sheet identifying any restriction on assets.
- 2) Provide copies of Parochial Reports for the past two years.
- 3) Comprehensive Property Insurance: Provide a copy of the binder or declarations page\
- 4) Provide a copy of the Deed and Plot Plan
- 5) [Certification from the local Deanery that they have been notified of the loan application.](#)