



INSTRUCTION SHEET FOR THE COMPLETION  
OF THE  
LPFA APPLICATION PACKAGE

**IT IS IMPORTANT THAT ALL OF THIS INFORMATION BE AS EXACT AS POSSIBLE. INCORRECT INFORMATION COULD RESULT IN THE LOSS OF TAX EXEMPT STATUS FOR YOUR BOND ISSUE.**

Please supply the requested information in typewritten form. This instruction sheet is meant to be used only as a guide. The staff of the Louisiana Public Facilities Authority (hereinafter referred to as the “Authority” or the “LPFA”) will be happy to assist you with any questions you may have. We can be reached at:

**LOUISIANA PUBLIC FACILITIES AUTHORITY**

2237 S. Acadian Thruway, Suite 650

Baton Rouge, LA 70808

Toll Free (800) 228-4755 Phone (225) 923-0020

Fax (225) 923-0021

[www.lpfa.com](http://www.lpfa.com)

[www.lela.org](http://www.lela.org)

1. Insert the Name by which the general public will know this facility or Project. (Example: the name as it will appear on a building sign, apartment sign, etc.)
2. Insert, as the Project Address, the following information: \*
  - a) Municipal Address, if known (Number and Street); or
  - b) If the project does not have a municipal address, please complete the description set forth on Page 1 of the Application Package. Please note that it is important to give a detailed description of the project’s location. A person reading the description should be able to easily locate the project solely from this description.

\* Be sure to determine if the Project is located within an incorporated area or in the unincorporated portion of the Parish. If it is in the unincorporated portion of the Parish, delete “City of \_\_\_\_\_” from the description.

3. Insert the estimated amount of the Bond Issue to be used for this Project. (If you underestimate what you need, an additional approval process will be necessary. It is always better to over estimate because approvals are not needed if you are reducing the amount of the bond issue. Remember to include allowances for fees for attorneys, architects, accountants, financial advisors, capitalized interest, etc.)
4. Complete the sentence by inserting a detailed description of the project that should include the following information, as applicable:
  - a) (Number) - unit Multi-Family facility.  
(Federal regulations require that at least 40% of the units must be reserved for low and moderate income families).
  - b) (Number) - bed ICF-I, ICF-II, SNF, extended-care, etc. facility.
  - c) Free standing ambulatory surgical center with attendant out patient care facilities, or a (Number) - bed psychiatric hospital, tuberculosis hospital, or hospital .
  - d) (Number) - square foot, (Number) - floor facility.

This list is not exclusive. If your Project does not fit one of these categories, please make the description similar.

5. Insert the estimated numbers called for.
6. Insert the exact legal name of the Project Owner. If your Project is to be owned by a Partnership or Corporation, check the appropriate space which identifies the type. It is important that the Partnership Agreement or Articles of Incorporation be filed of record with the Secretary of State's Office. In the case of a Partnership, the Partnership Agreement must also be filed in the records of the Parish(s) where the facility(s) will be located. A Corporation must file its Articles of Incorporation in the records of the parish of its domicile only.
7. Insert the name(s) and address(s) of:
  - a) Individual name(s) and address(s) (in case of Individual Ownership).
  - b) Principal shareholders (in case of Corporation).
  - c) General Partners (in case of Partnership).
8. Insert the name of the Person whom the Authority can readily contact in order to obtain additional information, if needed.
9. Insert the name of the public relations contact for this project. This person will be contacted to obtain detailed information about the project in order to answer questions from the media, if any, about the project. This information will be used by the LPFA in its media relations program.

10. Insert the name of the Project Owner's Attorney. This cannot be Bond Counsel. Bond Counsel represents the Bondholders (the purchasers of the bonds), not the Project Owner.
11. Insert the name of the State Senator (not U.S.) and the State Representative in whose voting district the facility will be located. (This information can be obtained from the Registrar of Voters office in the parish in which the facility will be located). Please be sure and obtain the names of the existing Senator and Representative and not newly-elected officials who have not taken office.
12. If someone other than the owner of the project is to guarantee repayment of the Bonds, please insert their name here. Otherwise, please leave this space blank.
13. If the project will be located in a historical building, please insert the age of the building. Otherwise, please leave this space blank.
14. Please provide the requested information about any recommendation for Bond Counsel. The Board of Trustees of the LPFA hires both Bond Counsel and LPFA's Special Issuer's Counsel. Although the Board of Trustees hires Bond Counsel, one of the main factors used to determine which law firm to hire is the recommendation, if any, from the project owner. **A copy of the Minimum Qualifications for Bond Counsel as approved by the LPFA Board of Trustees is included in this Application Package.** Please leave this item blank if you do not have any recommendation for Bond Counsel.
15. Please have the Project Owner's representative sign the Application and then send the completed Application **along with the non-refundable \$500 application fee** to the LPFA at the address set forth on the first page of these Instructions.
16. PROPOSED LAND ACQUISITION AND CONSTRUCTION BUDGET (Attachment-A)  
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The categories listed on this page are meant as guidelines only. The form may be retyped following the same format to include additional categories, as needed, for the project.

This sheet gives the Authority and the Louisiana State Bond Commission an indication of the proposed "hard" costs associated with the Project.

All "soft" costs such as legal fees, accounting fees, architectural fees, etc. should not be included in this proposed budget.

17. PRELIMINARY AGREEMENT FOR THE ISSUANCE OF BONDS

- a) Insert the day, month, and year of the LPFA Board of Trustees meeting at which preliminary approval of the project will be considered. If you do not know this date, please leave this blank.
- b) Insert the name of the Project Owner used in Number 6 of the Application.
- c) Insert the location of the principal place of business of the Project Owner specified in (b) above.
- d) Insert the name of the person who signed the Application and who will be signing the Preliminary Agreement.
- e) Insert the name of Project Owner used in (b) above.
- f) Signature of (d) above. Please type the person's name and title under the signature line.
- g) Signature of witnesses to the signature of (d) above.
- h) Insert the location of the Project as used in Number 2 on the Application.
- i) Insert the estimated amount of the bond issue as used in Number 3 on the Application.
- j) Insert the description of the Project used in Number 4 on the Application.

18. FEE INFORMATION - A separate fee information sheet is included in the Application Package.

Please review the Fee Information sheet that is included in the Application Package. This sheet explains the Authority's current policy regarding Application Fees, Financing Acceptance Fees, reimbursement for out of pocket expenses, and Annual Administrative Fees. It also describes the Louisiana State Bond Commission's application and closing fees.

- a) At the time of submission of the Application, a check in the amount of \$500 made payable to the Louisiana Public Facilities Authority is due. This check covers the LPFA Application Fee and is non-refundable.