

# Incentive Request Application

## The Incentive Program

The Anna Community Development Corporation (CDC), The Anna Economic Development Corporation (EDC) and the City of Anna follow set criteria for determining how public funds are invested in private developments aimed at strengthening the local economy and improving quality of life. The information collected through this form helps the ACDC evaluate the anticipated fiscal effects of a proposed private project on the community, as well as the expected return on any public investment involved. Every project requesting incentives—whether financial assistance, tax abatements, deferred taxes, or regulatory adjustments—must go through this fiscal impact analysis before any public support is approved. These guidelines also require each project to meet certain minimum performance standards. Projects that fall short of these benchmarks may still be reviewed, but only on an individual, case-by-case basis. Applications for incentives must be approved by the ACDC Board of Directors in an open meeting. All incentives must be contractually tied to certain performance criteria on the part of the requesting entity under Texas law. An application does not guarantee an incentive grant or assistance of any kind.

## Type A and B Eligible Projects

The City has both a Type A and Type B Economic and Community Development Corporation. Type A sales tax is primarily intended for manufacturing and industrial development. EDCs may use Type A revenues to fund land, buildings, equipment, facilities expenditures, targeted infrastructure and improvements for projects and job creation. The Type B sales tax may be used for any project eligible under Type A rules and several other project types, including quality of life improvements.

## Project Examples

- Job training classes and career centers
- Infrastructure assistance to retail or commercial projects
- Business-related sewer utilities and site improvements
- Light rail, commuter rail, or motor buses
- Type B projects with voter approval

## Company Information

**Business Name:**

**DBA Name:**

**Address:**

**Applicant Name:**

**Applicant Email:**

**Applicant Phone:**

## Company Profile

Provide a brief description of the product/service by the company:

## Company Structure

- Corporation
- Sole Proprietorship
- Partnership
- LLC

## Company Formation Details

NAICS/SIC Code(s)	<input type="text"/>
Date of Formation	<input type="text"/>
State of Formation	<input type="text"/>
Federal Tax ID Number	<input type="text"/>
Texas Tax ID Number	<input type="text"/>



# Project Information

## Type of Project Relocation Expansion New Construction

### Project Costs

Land:	<input type="text"/>	Equipment:	<input type="text"/>
New Construction:	<input type="text"/>	Inventory:	<input type="text"/>
Infrastructure:	<input type="text"/>	Furniture/Fixtures:	<input type="text"/>
Renovations:	<input type="text"/>	Job Training:	<input type="text"/>

## Employee Payroll Information

- Number of Current Full-Time Employees
- Projected Number of Years and Employees to be added with Incentive (Primary Jobs)  
 Year 1  Year 2  Year 3  Year 4  Year 5
- Average Wage of Existing Employees
- Projected Total Annual Payroll When All New Employees Have Been Added:
- Types of jobs created:

## Fund Sources

Please list all sources of fund that will used to finance the proposed project.

Source:	Amount:
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

## Fiscal Impact

- Estimated total value of capital investment
- Projected annual operating budget
- Amount direct sales tax will be generated
- Value of real and business personal property that will be added to the tax rolls

## Project Details

Which of the following types of facilities will the requested Incentives be used to help develop, retain or expand?

- |  |  |
|--|--|
| <input type="checkbox"/> manufacturing and industrial  | <input type="checkbox"/> small warehouse                               |
| <input type="checkbox"/> research and development      | <input type="checkbox"/> distribution center                           |
| <input type="checkbox"/> military                      | <input type="checkbox"/> data center                                   |
| <input type="checkbox"/> healthcare/bio life science   | <input type="checkbox"/> regional or national corporate headquarters   |
| <input type="checkbox"/> restaurant/retail/hospitality | <input type="checkbox"/> primary job training used by higher education |

If the Incentives will not result in the creation or retention of primary jobs, will such expenditure be used to construct public infrastructure.  Yes  No

- |  |  |
|--|--|
| <input type="checkbox"/> street and roads          | <input type="checkbox"/> drainage  |
| <input type="checkbox"/> water and sewer utilities | <input type="checkbox"/> site improvements                               |
| <input type="checkbox"/> rail spurs                | <input type="checkbox"/> telecommunications                              |
| <input type="checkbox"/> electric utilities        | <input type="checkbox"/> internet improvements                           |
| <input type="checkbox"/> gas utilities             | <input type="checkbox"/> other related improvements <input type="text"/> |

# Project Information

## Project Details Continued

Is Applicant seeking to **expand** an existing facility in the City of Anna?  Yes  No

If yes, what is the square footage of the existing facility and what is the square footage of the proposed expansion?

If yes, what is the approximate cost of the proposed expansion?

If yes, what is the estimated value of the Business Personal Property of the propose expansion?

Is Applicant seeking to **construct a new** facility in the City of Anna?  Yes  No

If yes, what is the square footage of the existing facility and what is the square footage of the proposed expansion?

If yes, what is the approximate cost of the proposed expansion?

If yes, what is the estimated value of the Business Personal Property of the propose expansion?

Is Applicant seeking to **renovate or move** existing facility in the City of Anna  Yes  No

If yes, what is the square footage of the existing facility and what is the square footage of the proposed expansion

If yes, what is the approximate cost of the proposed expansion

If yes, what is the estimated value of the Business Personal Property of the propose expansion

Does the Applicant currently own title to the property which will benefit from the expenditure of the Incentives?  Yes  No

Does the Applicant have a contract pending to purchase the property?  Yes  No

If yes, what is the closing date of the purchase contract?

## Litigation Acknowledgement

Is the company or any of its principals involved in any pending or current litigation or administrative proceeding or any outstanding administration orders, judgements, or injunctions to include company official or any of the principles involved in bankruptcy (for the past 5 years)?  Yes  No

If yes, please attach a narrative explaining the litigation and any other additional documentation as needed.

## Required Documents

Applications missing any information or documentation will not be accepted

- |   |  |
|---|--|
| <input type="checkbox"/> Proof of Ownership   | <input type="checkbox"/> Expansion Plan including 1 year Profit/Loss Statement                 |
| <input type="checkbox"/> Certificates of Fact/Status  | <input type="checkbox"/> Business Financial Statements for last 3 years                        |
| <input type="checkbox"/> Secretary of State   | <input type="checkbox"/> Personal Financial Statements of Owners with 20% or greater ownership |
| <input type="checkbox"/> State Comptroller  | <input type="checkbox"/> Personal tax return of Owners with 20% or greater ownership           |
| <input type="checkbox"/> Business Plan including Marketing and Communication Plan (if entity is under 5 yrs. old) | <input type="checkbox"/> Proof of business coverage  |
| <input type="checkbox"/> site plan  | <input type="checkbox"/> Proof of funding sources  |

# Project Information

## Credit Report

**\*\*Please read the following and sign the application below. All Owners of 20% or greater must sign this application.\*\***

This is an Equal Opportunity Program. Discrimination is prohibited by Federal Law. Complaints of discrimination may be filed with the appropriate authorities.

The information in this application is provided for the purpose of applying for funds under the City of Anna's CDC and EDC incentive programs. The information in this application is accurate to the best of my knowledge.

I understand that personal and/or business information may be requested pursuant to this application and I hereby give consent for such information to be provided to CDC/EDC. The approval of this application is subject to the CDC/EDC. I also understand that the City of Anna retains the sole decision as to whether or not an incentive offer is approved if one is offered by the CDC/EDC. It is my right to accept or decline an incentive.

I authorize the CDC/EDC to obtain a credit report on me through the credit reporting agency of its choice. If an adverse credit decision is made due totally or partly to the information on the credit report, CDC/EDC will give me a copy of the credit report, a summary of my rights under the Fair Credit Reporting Act, and the source of the credit report so that I may contact them if I wish.

I UNDERSTAND THAT ALL INFORMATION SUBMITTED TO THE CDC/EDC WILL BE KEPT ON FILE ACCORDING TO THE RECORDS RETENTIONS LAWS OF THE STATE OF TEXAS. IF I DO NOT REQUEST THE RETURN OF CERTAIN PRIVILEGED INFORMATION, IT WILL BE DISPOSED OF IN THE MANNER REQUIRED BY LAW.

## Signatures

<b>Name (Printed)</b>	<input type="text"/>		
<b>Title:</b>	<input type="text"/>		
<b>Signature</b>	<input type="text"/>	<b>Date:</b>	<input type="text"/>
<b>Name (Printed)</b>	<input type="text"/>		
<b>Title:</b>	<input type="text"/>		
<b>Signature</b>	<input type="text"/>	<b>Date:</b>	<input type="text"/>
<b>Name (Printed)</b>	<input type="text"/>		
<b>Title:</b>	<input type="text"/>		
<b>Signature</b>	<input type="text"/>	<b>Date:</b>	<input type="text"/>
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<b>Title:</b>	<input type="text"/>		
<b>Signature</b>	<input type="text"/>	<b>Date:</b>	<input type="text"/>