

CalHFA Loan Application and Checklist Instructions

The Loan Application and Checklist is an online Application. When you have completed your application and obtained the required checklist items, please email the Application portion only to the Loan Administration Manager, [Marisa Fogal](#) (unless you have already been in contact with your assigned Loan Administrator) and she will provide you with an assigned Loan Administrator if one has not yet been assigned. Your Loan Administrator will contact you via email with instructions to send the Checklist Items via CalHFA's Secure Send, Biscom.

If you have a comprehensive financial Proforma that includes the information we request in the following listed tabs, you can provide it in lieu of completing the UA tabs labelled: Rents; Subsidies; Dev Sources; Dev Budget; Perm S&U; Operating; Cash Flow.

Borrower is to provide checklist items to CalHFA electronically via Secure Send and should not be saved in subfolders. Files should be named each checklist item number then description (e.g. *2-Preliminary Title Report, 33- Appraisal, etc.*)

Please complete the appropriate Application Checklist and include it with the submitted checklist items.

Should you have subsequent due diligence to provide after you submit your application and attachments, please submit those items via email or secure send; if any of the documents are over 9 MB (megabytes) please send them via secure send.

When emailing due diligence please put the name of the project and the document name in the subject line.

Should you have any questions regarding this process please contact your Loan Administrator.