



Application Checklist

To ensure timely processing of the loan application, please include a copy of the **Application Checklist** to confirm that all documents listed on this page have been included. Additional documentation may be required and will be outlined when the applicant meets with staff to go over the loan request. Requests for additional information, will not impact the completeness of an application for purposes of assigning interest to the loan. For questions on required documentation, or for assistance with your application, please contact IWRB staff.

Application Information | Please confirm that you have read the included application information. If your organization has any questions or concerns with the application, required documentation, or general loan conditions, please contact IWRB staff using the contact information included on Page 1.

Application Form | Please ensure that all sections have been completed or notated with “NA”

Application Appendices | Please ensure the following required documents have been included, and are appropriately marked according to the corresponding appendix.

Appendix A | Bylaws & Approval

- **Copy of applicant’s governing rules of operation** (*Bylaws/Articles of Incorporation*)
- **Certification of approval to incur debt** ¹

Appendix B | Water Rights Documentation

Appendix C | Project Plans & Cost Estimates

Appendix D | Maps and Photos

- **Project Map**
- **Service Area Map** (*if not identified on the project map*)
- **Photos** (*if applicable and/or available*)

Appendix E | Project Permitting & Ownership

Appendix F | Financial Statements

- **Annual Profit/Loss Report or Financial Statements** for the **3** most recent calendar years

Appendix G | Attorney Statement ²

Appendix H | Additional Information

¹ Required only for Districts and organizations with statutory assessment authority; and for any organization where an approval for the incurrence of debt is conditioned in the organization’s governing rules of operation.

² Required only for Districts and organizations with statutory assessment authority.



Application for Financial Assistance

Application Checklist *(Continued)*

IRS Form W9 | *Complete this form only if the applicant would like receive loan disbursements via paper check.* The applicant must be registered with the Secretary of the State of Idaho, and with the Internal Revenue Service (IRS). Please confirm all sections of this form have been completed and are correct, and that an authorized signature has been included where noted. *Incorrect or incomplete information may result in a delay of the disbursement of loan funds.*

-OR-

Direct Deposit Form | *Complete this form only if the applicant would like to receive loan disbursements via electronic funds transfer.* Please complete the included “Combined Substitute W-9/Direct Deposit/Remittance Advice Authorization Form (rev. 10/2021).” The name associated with the bank account for deposit must match the name of the loan sponsor and its registered tax identification number. *All sections of this form must be completed. Incorrect or incomplete information may result in a delay of the disbursement of loan funds.*