CalHFA℠ California Housing Finance Agency

CalHFA Multifamily Loan Application and Checklist Instructions

(For projects that **do not** include Mixed-Income Program Financing)

1) Contact a Multifamily Loan Officer to determine if the project is eligible for one of CalHFA's loan programs. A general description of the project and detailed proforma will be required at this time.

Kevin Brown, kbrown@calhfa.ca.gov, 916-326-8808
Jennifer Beardwood, jbeardwood@calhfa.ca.gov, 916-326-8805

2) Once the project is deemed eligible, a Loan Administrator will be assigned to the project. The Loan Administrator will contact the developer and provide a SecureSend link and instructions to submit the loan application* and due diligence items.

   a. Completed TCAC Application Workbook

   b. Completed and Executed CalHFA Application Addendum

   c. All Due Diligence checklist items numbered 1-45 ("Initial Checklist Items") are required for initial commitment and CDLAC submission. Saved file names for Initial Checklist items should reflect the number of the item and description (e.g. 1- TCAC Workbook, 9- Purchase Appraisal, etc.).

   d. A check payable to CalHFA representing the Application Fee must be sent to the Loan Administrator at the time of application submission (see loan program term sheet for Application Fee amount).

   *Developers must complete the TCAC workbook and CalHFA Application Addendum. Proforma numbers will no longer be accepted in lieu of a completed loan application.

3) Due diligence items submitted subsequent to the initial SecureSend transmission should be submitted to the Loan Administrator through email. Files exceeding 9 MB (megabytes) can be submitted through SecureSend. Please include the project name in email subject line.

Please contact the assigned Loan Administrator with any questions.

Updated 7/19/2023