



Application for Economic Development Assistance

The following information is required for all projects requesting economic development assistance from the City of Lufkin (City) or the Lufkin 4B Economic Development Corporation (LEDC). Fill in all spaces on the application form. If the information requested is not applicable, enter "N/A" in the space. Incomplete applications will not be considered for assistance. After receipt of the application, the City or LEDC may require additional information to be submitted to indicate the financial abilities or other factors of the company.

Applicant/Business Name		Business Ownership	
Mailing Address (Business Headquarters)			
City	State	Zip Code	
Phone Number		Fax Number	
Applicant's Representative		Title	
Mailing Address (if different from above)			
City	State	Zip Code	
Phone Number		Fax Number	

I certify that the information submitted in this application, including attachments, is true, correct and complete. Omissions or submission of incorrect information will render this application invalid.

Signature of Applicant's Representative

Date

Project Information

Description of the Project			
NAICS Code¹		NAICS Code Description	
Property Address		Legal Description (attach if necessary)	
Value of Improvements for this project			
Building	Equipment	Total	Est. Taxable
Existing Targeted Facility or New Building?			
Existing / New			
Existing Industry Expansion?	New Industry?	Building currently up to code?	Environmental Issues Needing Addressed
Yes	Yes	Yes	Yes
No	No	No	No
Construction Time Frame (month/year)			
Start:		Complete:	
Construction Materials To Be Purchased (\$)		Percent Purchased in Lufkin	
Equipment & Furniture To Be Purchased (\$)		Percent Purchased in Lufkin	
Construction Workers Payroll²		Percent Spent in Lufkin³	
Annual Facility Purchases⁴		Percent Purchased in Lufkin	
Purchases of Raw Materials From Local Manufacturers or Suppliers⁵			
NAICS Code	NAICS Code Description	Annual Purchases	
Projected Annual Sales		Annual Sales in Lufkin⁶	Percent Subject to Sales Tax
Will this project Have a tourism impact on the community (create local hotel stays?)			
If yes, complete the Tourism Project Supplemental Information page (available from the HDC).			

Utility Usage Information

Water Average Monthly Usage (1,000 gallons)	Solid Waste Size Dumpster Requested / Monthly Pick-Ups
Waste Water Average Monthly Usage (1,000 gallons)	Electrical Service Needed Transformers Needed? (Yes / No) Size:
Natural Gas Needs Pressure Needed / Volume Usage Per Month	Rail Weight Rail Needed / Average Monthly Volume
Rail	Other (Use Additional Sheet to Explain if Necessary)
Car Storage Needs On-Site (Yes / No) # of Cars:	

Employment Information

Number of Employees (FTE)			Annual Payroll		% Previously Unemployed
Cur / New	Cur/ New	Cur/New	Yr. 1	Yr. 3	
Yr. 1-	Yr. 3	Yr. 5	Yr. 1	Yr. 3	
Yr. 5			Yr. 5		
# of Hourly	Ave. Wage/Hour		# of Salaried		Ave. Annual Salary
Unskilled=			Admin.=		
Semi - Skilled=			Managerial =		
Skilled =			Sales =		
Other =			Other =		
Benefits Offered					
Health Plan		Cost to Employee/Mo		Family Coverage Available	
Yes / No				Yes / No	
Retirement/401K		Vacation (#/yr)		Sick Days (#/yr)	
Yes / No					
Profit Sharing		Dental Insurance		Life Insurance	
Yes / No		Yes / No		Yes / No	
				Disability Insurance	
				Yes / No	

Please briefly explain your benefits package. Some items to cover are: Are same benefits offered to all employees? If not please explain the difference between plans. Is there a probationary period before benefits are offered? Are there any planned or expected changes in benefits in the near future? Does your salary schedule and your benefit package meet the requirements set forth in the current version of the City of Lufkin Tax Abatement Guidelines?

Notes

1. **NAICS Code:** North American Industry Classification System. The NAICS Manual is available for use at www.lufkinedc.com.
2. **Construction Workers Payroll:** Payroll should include all construction workers. You may need to require bids from subcontractors to be detailed to show payroll.
3. **Percent Spent in Lufkin:** Percent of construction workers' payroll that will be spent by the workers in Lufkin (food and other retail purchases).
4. **Annual Facility Purchases:** Annual purchases of operating items such as office supplies, cleaning supplies, etc. that are subject to sales tax.
5. **Purchases of Raw Materials from Local Manufacturers:** Purchases of raw materials used in the manufacturing process that are *not* subject to sales tax.
6. **Annual Sales in Lufkin:** Estimated sales to Lufkin customers. If the company has no Lufkin customers, enter "none."
7. **Capital Investment Needed:** Cost of installing new water or sewer lines.

Economic Development Assistance Requested

Tax Abatement Requested	First Year of Abatement	Abatement Schedule Requested*
Yes / No		
Who is the owner of the taxable real property for which tax abatement is sought?***		
Is the taxable real property located in a City of Lufkin reinvestment zone?		
Yes / No		
Other incentives requested (Yes / No) What is being requested?		
Explanation/Justification		

* **Abatement Schedule Requested:** Please refer to the City of Lufkin tax incentive policy statement and use your best estimation of your project’s score to determine the applicable tax incentive schedule.

****Owner of the Taxable Real Property:** Chapter 312 of the Texas Tax Code authorizes a municipality to enter into a tax abatement agreement *only* with the owner of taxable real property located in a reinvestment zone.

Required Attachments

The following items must be provided to the City of Lufkin prior to consideration of incentives: Please submit each item listed as a separate item.

1. Plat/Map of Property, extending 500 ft beyond property in all directions. (City can assist if needed)
2. Detailed List of Improvements, Including Equipment
3. Business Plan
4. Current Financial Report
5. Audited Financials for Previous Three Years
6. Tax Certificate (Company’s Tax I.D. #)
7. Letter Addressing and committing to Tax Abatement Minimum Standards.

Application Submission

Submit the completed application by mail or in person to:

LEDC
C/O: Steve FLoyd
300 E. Shepherd
P.O. Box 190
Lufkin, TX 75902-0190
sfloyd@cityoflufkin.com

This application must be filed with the LEDC prior to filing Building Permit or Business License applications with the City. If you have questions about this application, please contact the LEDC at (936) 633-0221.

Addendum A

Tourism Project Supplemental Information

Expected Overnight Stays in Lufkin (# of rooms)			
Pre-Construction	Construction	1-3 yrs. After opening	3-5 yrs. After opening
Explanation/Justification			
Potential Ancillary/Complementary Hospitality Related Development (Include: hotels, motels, tourist attractions, recreation areas)			