





Fairfax County Park Authority Resident Curator Program Curator Application

Lahey Lost Valley



Lahey Lost Valley 9750 Brookmeadow Drive, Vienna VA Owner: Fairfax County Park Authority

Lahey Lost Valley Park Hunter Mill Supervisory District

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SECTION A: APPLICATION SUBMISSION INSTRUCTIONS

The County of Fairfax, Virginia ("County") and the Fairfax County Park Authority ("FCPA") invite interested parties to submit an application for the curatorship of

Lahey Lost Valley 9750 Brookmeadow Drive Vienna, VA 22182

Application Submittal Instructions

Submit an electronic version of the completed application to:

Stephanie Langton, Resident Curator Program Manager Fairfax County Park Authority Stephanie.Langton@fairfaxcounty.gov

Submissions will be open until an application is received. Once Resident Curator Program staff receive an application, a deadline for additional applications will be set for 30 calendar days following the date the initial application was received. Review of applications will begin upon expiration of the due date. Therefore, applicants are strongly advised to submit their applications on time to ensure consideration by the County and FCPA.

Applicants should examine the ISA and its table of contents to ensure that all pages are included. The County and FCPA assume no responsibility for an application submitted on the basis of an incomplete ISA package.

Applicants are expected to review all requirements and instructions and furnish all information required by this ISA. Failure to do so will be at the applicant's risk. The County and FCPA reserve the right to waive formalities in any application, and may, if they determine that such action is in the best interests of the County, select an application which does not conform in all details with the requirements of this ISA. Likewise, the County reserves the right to reject any and all applications.

This ISA does not commit the County to enter into any disposition of real property interest; or to pay any costs, including costs associated with any studies or designs, incurred by any party in the preparation and submission of an application.

A hard copy of this application can be obtained from the project manager upon request.

Applications will not be returned and will be retained in the records of FCPA subject to the Virginia Freedom of Information Act and the document retention policies of the Library of Virginia.

Inquiries and Explanations

All inquiries concerning this ISA should be directed, in writing, to: Fairfax County Park Authority
Resource Management Division
Attn: Stephanie Langton, Resident Curator Program Manager
9601 Courthouse Road
Vienna, VA 22181
Stephanie.Langton@fairfaxcounty.gov
(703) 324 - 8791

Any explanation desired by an applicant regarding the meaning or interpretation of this ISA must be submitted and received in writing no less than seven (7) business days prior to the application due date to allow sufficient time for a reply to reach the applicant prior to the submission of their application. Verbal explanations or instructions shall not be binding on FCPA or the County.

Application Instructions

Applications must follow the outline, supply all of the information requested below, and demonstrate the ability of the potential curator to undertake a challenging and complex assignment. Applications must be feasible and should reflect an understanding of the historic qualities of the property and their value. It is intended that the substance of an application, as approved by FCPA and the County, will be incorporated into all agreements.

A cover letter is required with all applications.

Applications must include responses to all sections. **No section should be left blank.** If a section does not apply, "not applicable" should be indicated. Failure to answer all questions completely will delay the processing of an application. Provide responses in the spaces provided and attach additional sheets or documentation as necessary.

INVITATION TO SUBMIT APPLICATION FOR CURATOR

SECTION B: APPLICANT INFORMATION

List the names, addresses and telephone numbers of each individual applicant, or all principals, partners, members or shareholders. Attach additional sheets if necessary.

Applicant's Name					
Address					
City State Zip					
Email		Telephone			
Alternative Telephone Number	er				
Additional Applicant's Name	, if applicable				
Address					
City	State	Zip			
Email		Telephone			
Alternative Telephone Number					
Additional Applicant's Name, if applicable					
Address					
City	State	Zip			
Email	•	Telephone			
Alternative Telephone Number					

INVITATION TO SUBMIT APPLICATION FOR CURATOR

SECTION C: PROPOSED USE

Only residential use proposals will be considered for this property.

Provide a short summary of how the proposed use of the property as a residence with a curator is compatible with:

- The long-term preservation of the house and its associated cultural landscape;
- FCPA's mission and management of park;
- The surrounding neighborhoods;
- The historic value of the house; and
- The historic context and heritage associated with the park

SECTION D: PUBLIC BENEFIT

The Resident Curator Enabling Legislation requires reasonable public access consistent with the property's nature and use. Current resident curators typically satisfy this requirement by hosting an annual open house event for the public. Applicants may propose additional or alternative means of public access (ie, curator blog, video documentation).

Describe the scope and nature of the proposed public access, and any proposed projects / programs / services that will fulfill this requirement.

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SECTION E: REHABILITATION AND MAINTENANCE PLAN

Curator lease terms are comprised of a Rehabilitation Phase and a Continued Maintenance Phase. The Rehabilitation Phase involves the major improvements required by contract, as well as routine maintenance of the curator structures and grounds in accordance with the Resident Curator Program's "Maintenance Guidelines and Checklist". Upon completion of the Rehabilitation Phase, the curator enters into the Continued Maintenance Phase, during which the curator shall continue routine maintenance of the property on a continuous basis, including capital improvements as necessary, during the remaining lease term.

Part 1: Rehabilitation Work Plan with General Schedule

Describe, in general terms, how the rehabilitation phase of the project will be carried out, including an outline of the improvements to be completed by contractor and those that will be completed by the curator. Include a general schedule with milestones for required improvements listed in the "2024 Updated Lahey Lost Valley Treatment Plan", in compliance with the Secretary of the Interior's Standards for the Treatment of Historic Properties. The curator is to complete the rehabilitation work as set out in the approved work plan within a maximum of five (5) years of initializing the rehabilitation phase. The selected curator will be asked to develop a detailed schedule of improvements that will be included in the lease.

Document Links

2018 Lahey Lost Valley Historic Structure Report & Treatment Plan

2019 Mechanical Electrical Plumbing Assessment

2024 Updated Lahey Lost Valley Treatment Plan

Documents are also available on the Resident Curator Program website:

https://www.fairfaxcounty.gov/parks/resident-curator-program



INVITATION TO SUBMIT APPLICATION FOR CURATOR

Part 3: Description and Documentation of Donations

If applicable, describe in detail any labor, material, or services proposed to be donated by third party sources. Written commitments for such labor, material, or services must be provided as an attachment to the application.

Part 4: Sustainability

If applicable, describe any proposed historically appropriate, environmentally sustainable building technology and practices that will be used in the rehabilitation, maintenance, and/or operation of the property, in compliance with the Secretary of the Interior's Standards for Rehabilitation & Illustrated Guidelines for Rehabilitating Historic Buildings.

Part 5: Accessibility

All curators must comply with applicable requirements of the Americans with Disabilities Act as the buildings are public facilities under Title II of the ADA (state and local governments). Describe how the requirement for reasonable public access will be met, including "programmatic" access under the ADA, by either making physical modifications or programmatic accommodations. Programmatic could include annual open house, video tour, brochures with photos, etc.

INVITATION TO SUBMIT APPLICATION FOR CURATOR

SECTION F: EXPERIENCE AND QUALIFICATIONS

Part 1: Applicant's General Qualifications

Provide a narrative summary of the applicant's experience and qualifications to undertake, implement, and manage the rehabilitation, reuse and maintenance of the historic property. Include the applicant's resume or CV, and references to support such experience and qualifications. Supplemental material describing pertinent projects, including visual aids, is encouraged but not required.

Include a list of all of the following actions which have become final in the three years prior to the application submission:

- 1. Willful violations, violations for failure to abate, or repeated violations, for which the applicant was cited by (a) the United States Occupational Safety and Health Administration; (b) the Virginia Occupational Safety and Health Administration; or (c) the occupational safety and health plan for any public jurisdiction; or
- 2. Three (3) or more serious construction safety violations for which the applicant was cited by the (a) United States Occupational Safety and Health Administration; or (b) the Virginia Occupational Safety and Health Administration; or (c) the occupational safety and health plan from any public jurisdiction.
- 3. Termination of a contract between the applicant and any public entity for safety violations.

If the applicant has not received or been the subject of any such violations referenced above in the three (3) years prior to the application submission, then the applicant shall so indicate by certification on the application.

INVITATION TO SUBMIT APPLICATION FOR CURATOR

Part 2: Applicant's Specialized Skill in Historic Preservation

Describe the applicant's specialized skills in historic preservation projects, including any relevant experience with the Secretary of the Interior's Standards for the Treatment of Historic Properties, 36 CFR Part 68 (2013), as amended.

Part 3: Professional Service Providers' General Qualifications

If available at this time, provide the professional qualifications and relevant work history of any professional service providers, contractors or subcontractors, involved in rehabilitation and/or maintenance phases of the curator including, but not limited to architects, general contractors, and subcontractors such as plumbers, electricians, etc.

Include a list of all of the following actions which have become final in the three years prior to the application submission for any such providers, contractors or subcontractors listed:

- 1. Willful violations, violations for failure to abate, or repeated violations, for which the provider, contractor or subcontractor was cited by (a) the United States Occupational Safety and Health Administration; (b) the Virginia Occupational Safety and Health Administration; or (c) the occupational safety and health plan for any public jurisdiction; or
- 2. Three (3) or more serious construction safety violations for which the provider, contractor or subcontractor was cited by the (a) United States Occupational Safety and Health Administration; or (b) the Virginia Occupational Safety and Health Administration; or (c) the occupational safety and health plan from any public jurisdiction.
- 3. Termination of a contract between the provider, contractor or subcontractor and any public entity for safety violations.

For each provider, contractor or subcontractor that has not received or been the subject of any such violations referenced above in the three (3) years prior to the application submission, then the applicant shall so indicate by certification on the application.

INVITATION TO SUBMIT APPLICATION FOR CURATOR

Part 4: Professional Service Providers' Qualifications in Historic Preservation

If available at this time, provide the professional qualifications and relevant work history of any professional service providers, contractors or subcontractors, involved in the rehabilitation and/or maintenance phases of the curator including, but not limited to architects, general contractors, and subcontractors such as plumbers, electricians, etc. pertaining to the Secretary of the Interior's Standards for the Treatment of Historic Properties, 36 CFR Part 68 (2013), as amended.

INVITATION TO SUBMIT APPLICATION FOR CURATOR

SECTION G: ESTIMATED PROJECT COSTS

Use the table below to summarize proposed expected costs (Attach more detailed breakdowns if desired).

PROJECT COSTS BUDGET				
Cost Category	Amount	Total Amount		
Hard Costs				
General Conditions (mobilization, temporary facilities)				
Site Work				
Excavation				
Foundation				
Demolition				
Superstructure				
Floor Structure				
Roof Structure & Cover				
Doors & Windows				
Interior Construction				
Plumbing				
HVAC				
Electrical				
Sprinklers				
Conveying Systems (if applicable)				
Utility Upgrades (electrical, water, sanitary)				
HAZMAT Abatement				
Specialties				
Clean up				
Miscellaneous				
Construction Contingency (%)				
Soft Costs				
Architectural Fees				
Engineering Fees				
Third party HAZMAT inspection, testing, and monitoring				
Other Design Fees				
Commissioning HVAC, sanitation systems				
Construction Period Interest				
Other Financing Fees				
Other Consulting Fees				
Permits and Licenses				
Construction Administration fees				
Other Soft Costs				
Design Contingency (%)				
Other Project Co				
TOTAL PROJECT COS	TS			

INVITATION TO SUBMIT APPLICATION FOR CURATOR

SECTION H: LEASE LENGTH CALCULATIONS

The cost of ongoing maintenance of the property will be factored into the calculation of lease length (assuming all required maintenance tasks are being performed according to the guidelines established in the "Maintenance Guidelines and Checklist.")

An additional annual amount will be factored into this calculation, to recognize the value of the occupation and management of the property (utilities, fees, any applicable taxes, etc.).

Credited Annual Maintenance Costs

Including but not limited to: grounds maintenance, gutter cleaning, roof repairs/replacement, repointing, maintaining/ replacing mechanical systems, etc. (See "Maintenance Guidelines and Checklist")

2018 Historic Replacement Value	Multiply the Historical Replacement Value by 1%	Total Annual Maintenance Expense	
\$1,224,000	1%	\$12,240	

Credited Annual Occupancy/Management Costs

For example: utilities, additional required liability insurance, legal fees, public benefit component, property taxes, etc. The dollar amounts used were calculated using previous utility bills and a Department of Tax Administration tax assessment for the house and on acre of land.

Utilities	\$1,698
Real Estate Taxes	\$8,508
Other Miscellaneous Expenses	\$746
Total Annual Occupancy and Management Expenses	\$10,952

Total Credited Additional Curator Expenses

Total Annual Maintenance Expense	\$12,240
Total Annual Occupancy and Management Expenses	\$10,952
Total Credited Additional Curator Expenses	\$23,192

INVITATION TO SUBMIT APPLICATION FOR CURATOR

SECTION I: LEASE TERM

According to the Park Authority's Enabling Legislation, FCPA must establish a Fair Market Rental Value (FMRV) for the property. For the purposes of this solicitation, FCPA is establishing a rent value of \$33,000per annum for the length of the base term, as determined by an independent appraiser. The length of the lease term will be determined based upon the following:

- Annual Fair Market Rental Value (FMRV)
- Estimated Rehabilitation Project Costs
- Credited Annual Maintenance Costs: Including, but not limited to: grounds maintenance, gutter cleaning, roof repairs/replacement, repointing, maintaining/replacing mechanical systems, etc. (See "Maintenance Guidelines and Checklist")
- Credited Annual Occupancy and Management Costs: includes utilities, insurance, legal fees, public benefit component; prorated property taxes, etc.

Formula for Estimating Lease Length

Annual Fair Market Rental Value *minus* Credited Annual Maintenance Costs *minus* Credited Annual Occupancy and Management Costs *equals* Adjusted Annual Fair Market Rental Value.

Total Rehabilitation Project Costs *divided by* Adjusted Annual Fair Market Rental Value *equals* Estimated Lease Term, in years.

	Annual	Total
Rehabilitation Project Costs Provided by Applicant (Total Project Costs, see Section G)		\$
Annual Fair Market Rental Value (FMRV)	\$33,000	
Credited Annual Maintenance Costs (see Section H)	\$12,240	
Credited Annual Occupancy & Management Costs (see Section H)	\$10,952	
Adjusted Annual FMRV	\$9,808	
Rehabilitation Project Costs/Adjusted FMRV = Estimated Length of Lease, or Lease Term, in years		

Insert the estimated cost of your rehabilitation plan into this formula and state the estimated lease term. Please describe any considerations that you wish for FCPA to make in the negotiation of the lease term.

Estimated Lease Term, in years

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SECTION J: FINANCING PLAN

This section is used to determine the financial viability of the application. Applicants should redact social security numbers, account numbers, and other sensitive identification information when submitting their application. Please provide the following information:

Estimated Funding Sources

Detail the projected funding sources. Documentation supporting each funding source should be attached to the application, including formal written commitments for any donated funding, labor, materials, or services from the party making the donation.

Equity (note sources below)	\$
	\$
	\$
	\$
	\$
	\$
Financing (note sources below)	\$
	\$
	\$
	\$
	\$
	\$
Other Sources(note sources below)	\$
	\$
	\$
	\$
	\$
	\$
TOTAL PROJECTED FUNDING:	\$
TOTAL ESTIMATED PROJECT COSTS (from Section G)	\$

INVITATION TO SUBMIT APPLICATION FOR CURATOR

Narrative Statement of Financial Capacity

Describe how the applicant intends to finance the rehabilitation, reuse, and ongoing maintenance of the property. Specifically, describe how each of the following will be financed:

- all of the pertinent tasks listed in the "2024 Updated Lahey Lost Valley Treatment Plan"
- any proposed alternative tasks as described in <u>Section E: Proposed Alternatives or Amendments to Required Improvements</u> not listed in "2024 Updated Lahey Lost Valley Treatment Plan"
- any additional proposed improvements described in <u>Section E: Proposed Alternatives or Amendments to Required Improvements</u>
- all future maintenance costs (See <u>Section H: Estimated Annual Maintenance Costs</u>, and "Maintenance Guidelines and Checklist")
- all management costs related to proposed reuse including utilities, insurance, legal costs, fees, contingencies, etc. (See Section H: Estimated Annual Occupancy/Management Costs)

Applicants should be advised that depending on the applicant's financial capability, the proposed use and other considerations, the lease agreement may require that the applicant deliver maintenance, performance and/or payment bonds, or letters of credit in connection with the rehabilitation and maintenance of the property in forms and amounts satisfactory to the County and FCPA.

Personal Financial Statement

Complete this form for each app List only those assets you want to	′ = =	s, partners, members or shareholders list his personal financial statement.	eted in <u>Section B</u>
Name Business Phone			
Address	Address Residence Phone		
City, State, & Zip Code			
ASSETS	(Omit Cents)	LIABILITIES	(Omit Cents)
Available cash	\$	Accounts Payable	\$
Savings Accounts	\$	N. D. H. D. L. 104	
IRA or Other Retirement Account	\$	Notes Payable to Banks and Others (Describe in <u>Subsection 2</u>)	\$
Accounts & Notes Receivable	\$	Installment Account (Auto)	\$
Life Insurance-Cash Surrender		Mo. Payments \$	
Value Only (Complete <u>Subsection 8</u>)	\$	Installment Account (Other)	\$
Stocks and Bonds		Mo. Payments S	5
(Describe in <u>Subsection 3</u>)	\$	Loan on Life Insurance	\$
Real Estate (Describe in Subsection 4)	\$	Mortgages on Real Estate or Rent listed per month(Describe in Subsection 4)	\$
Automobile-Present Value	\$	Unpaid Taxes (Describe in Subsection 6)	\$
Other Personal Property (Describe in <u>Subsection 5</u>)	\$	All other Liabilities such as liens, judgments, loans, and other debt	
Other Assets (Describe in Subsection 5)	\$	(Describe in <u>Subsection 7</u>) Net Worth	\$
Total	\$	Total \$	
Subsection 1. Source of Income		Contingent Liabilities	
Salary	\$	As Endorser or Co-signer	\$
Net Investment Income	\$	Legal Claims & Judgments	\$
Real Estate Income	\$	Other contingent liabilities not listed.	\$
Other Income (Describe below)*	\$		\$

Description of Other Income in Subsecti Source	ion 1.*				Annual Income Amount
Source					
*NOTE: Alimony payments do not nee payments counted toward total those payments must also be d toward total income.	al income. I	f such pa	yments ar	re disclosed,	the conditions and length of
Subsection 2: Loans Payable to Banks a List loans, mortgages, credit card accou attachment must be identified as a par	nts, and otl		•		ents if necessary. Each
Name and Address of Noteholder(s)	Original Balance		-	Frequency (Monthly, etc.)	How Secured or Endorsed Type of Collateral if applicable.

INVITATION TO SUBMIT APPLICATION FOR CURATOR

Number of Shares Name of Securities Cost Market Value Quotation/ Exchange Date of Quotation/ Exchange Exchange		مناحب ما			ssary. Each attachme		
Subsection 4. Real Estate Owned. Clist each parcel separately. Use attachment if necessary. Each attachment be identified as a part of this statement and signed.) Property A		<i>'</i>		la i			m . 1 7 7 1
Dwned. De identified as a part of this statement and signed.) Property A Property B Property C Address Date Purchased Driginal Cost Present Market Value Name of Mortgage Holder Mortgage Balance Amount of Payment per Month/Year			es	Cost	Quotation/	Quotation/	
be identified as a part of this statement and signed.) Property A Property B Property C Appe of Property G General Statement and signed.) Property A Property B Property C General Statement and signed.) Property A Property B Property C General Statement and signed.) Property A Property B Property C General Statement and signed.) Property A Property B Property C General Statement and signed.) Property A Property B Property C General Statement and signed.) Property A Property B Property C General Statement and signed.)							
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Address Date Purchased Driginal Cost Present Market Value Hame of Mortgage Holder Mortgage Balance Amount of Payment per Month/Year			Property A		Property B		Property C
Oate Purchased Original Cost Present Market Value Name of Mortgage Holder Mortgage Balance Amount of Payment per Month/Year	e of Property						
Original Cost Present Market Value Jame of Mortgage Holder Mortgage Balance Amount of Payment per Month/Year	lress						
resent Market Value fame of Mortgage Holder fortgage Balance mount of Payment per Month/Year	e Purchased						
fame of Mortgage Holder fortgage Balance mount of Payment per Month/Year	ginal Cost						
Mortgage Balance mount of Payment per Month/Year	sent Market Va	alue					
amount of Payment per Month/Year	ne of Mortgag	ge Holder					
amount of Payment per Month/Year							
	rtgage Balance						
tatus of Mortgage	ount of Payme	ent per Month/Year					
	us of Mortgage	e					
Subsection 5. Other Personal Property and Other Assets (Describe, and if any is pledged as security, state in address of lien holder, amount of lien, terms payment and if delinquent, describe delinquency)				,	•		

INVITATION TO SUBMIT APPLICATION FOR CURATOR

Subsection 6. Unpaid Taxes. (Describe in detail, as to type, to whom payable, when due, amount, and to what property, if any, a tax lien attaches.
Subsection 7. Other Liabilities including all alimony and child support payments owed. (Describe in detail.)
Subsection 8. Life Insurance Held. (Give face amount and cash surrender value of policies - and name of insurance company

Transcript of Tax Returns for past 3 years:

Submit tax transcripts for the most recent 3 proceeding tax years. Applicants are able to obtain a digital copy of their tax transcripts for the current year and the past three years from the IRS website. Instructions can be found here: https://www.irs.gov/uac/newsroom/request-a-transcript-or-copy-of-a-prior-year-tax-return.

Bank References

Lending Institution	Name of Lender	Address	Phone

Bankruptcy Disclosure

If the applicant or any affiliated business entity of the applicant or any of the entity's officers, principal, or investors has been adjudged bankrupt, either voluntarily or involuntarily, within the last ten years, please note the date and the judgment, the Court where the judgment was taken, and the names of all debtors joined in the bankruptcy petition.

INVITATION TO SUBMIT APPLICATION FOR CURATOR

SECTION K: ORGANIZATIONAL STRUCTURE (IF APPLICABLE)

If the Applicant is acting officially on behalf of an organization, please describe fully the nature of the organization, including:

The Legal Structure and IRS Designation of Organization: (Corporation, LLC, JV, LP, 501(c), etc.)

Nature of the Organization's Business

The Legal History of the Organization

Attach a copy of all incorporating documents, including articles of incorporation, by-laws, operating agreements, trust agreements, etc.

Certificate of Good Standing

Attach Certificate of Good Standing (Corporation) or a Certificate of Fact of Existence (LLC)

If Applicant's proposal contemplates operating a business at the property, please note the following requirements:

License Requirement

All firms doing business in Fairfax County shall obtain a license as required by Chapter 4, Article 7.2, of The Code of the Fairfax County, Virginia, as amended, entitled "Business, Professional and Occupational Licensing (BPOL) Tax." Questions concerning the BPOL Tax should be directed to the Department of Tax Administration, telephone (703) 222 8234 or visit: https://www.fairfaxcounty.gov/taxes/business.

Registering Of Corporations:

In accordance with Virginia Code Section 13.1 758, any foreign corporation transacting business in Virginia shall secure a certificate of authority as required by Section 13.1-757 of the Code of Virginia, as amended, from the State Corporation Commission, Post Office Box 1197, Richmond, Virginia 23209.

SECTION L: CERTIFICATIONS

I, _		, do h	ereby state that I am an
(Your name here)		·
(Ch	neck one)		
	Applicant		
	Applicant's authorized agent		
true ind all neg pro	I that, to the best of my knowledge and belief, e and accurate and that the information contain ividual applicants, and all principals, partners, business entities involved in the proposed cura gotiation of any lease and execution of any lease vide any changed or supplemental information the type described above, that arise on or after	ned in this application is members or sharehold tor have been listed above, I will reexamine thing, including business of	ers of the applicant and ove, and that prior to the sertification and r financial relationships
Sig	ned under the penalties of perjury.		
 SIG	ENATURE	DATE	
and	ereby certify that I have filed all state tax return I am not in arrears to the County of Fairfax on a County of Fairfax and my County taxes and/o	debt or contract, am not	a defaulter on surety to
Sig	ned under the penalties of perjury on this	day of	20
SI	GNATURE	FEDERA	L TAX ID NO.
Sec em	e undersigned also acknowledges and states the etion B: Applicant Information have participate ployee of the Fairfax County Government in the plication or Lease Transaction.	ed in the capacity of ar	officer or
Sig	ned under the pains and penalties of perjury.		
 SIG	ENATURE	 DATE	