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Application Title [Instructions and Insurance Requirements Document](#)

Section I: Applicant Background Information

Please answer all questions. Use "None" or "Not Applicable" where necessary. Information in this application may be subject to public review under New York State Law.

Applicant Information - Company Receiving Benefit

Total Project Cost

Applicant Name

Applicant Address

Phone

Fax

E-mail

Website

Fed ID#

Individual Completing Application

Name

Title

Address

Phone

Fax

E-Mail

Company Contact (if different from individual completing application)

Name
Title
Address
Phone
Fax
E-Mail

Company Counsel

Name of Attorney
Firm Name
Address
Phone
Fax
E-Mail

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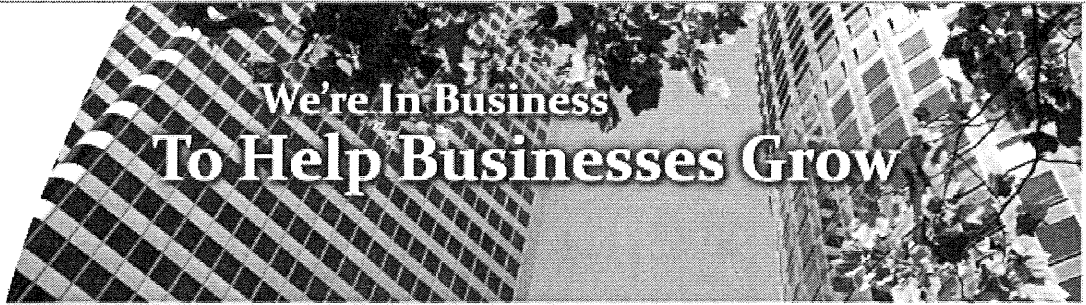
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Identify the assistance being requested of the Agency

Exemption from Sales Tax

Yes No

Tax Exempt Financing

Yes No

Exemption from Mortgage Tax

Yes No

Exemption from Real Property Tax

Yes No

Assignment/Assumption of existing PILOT benefits

Yes No

Business Organization (check appropriate category)

Type of Business

- Corporation
- Public Corporation
- Sole Proprietorship
- Partnership
- Joint Venture
- Limited Liability Company
- Other

Year Established

2012

State of Organization

New York

List all stockholders, members, or partners with % of ownership greater than 20%

Please include name and % of ownership.

Paul Bliss, is the Manager of the single member LLC.

Business Description

Describe in detail company background, products, customers, goods and services

The company is a developer of affordable housing units for senior citizens capable of living independently.

Estimated % of sales within Erie County

n/a

Estimated % of sales outside Erie County but within New York State

n/a

Estimated % of sales outside New York State

n/a

Estimated % of sales outside the U.S.

n/a

What percentage of your total annual supplies, raw materials and vendor services are purchased from firms in Erie County? (You may be asked to provide supporting documentation of the estimated percentage of local purchases)

It is anticipated that most, if not all, supplies, raw materials and vendors services will be from firms in Erie County.

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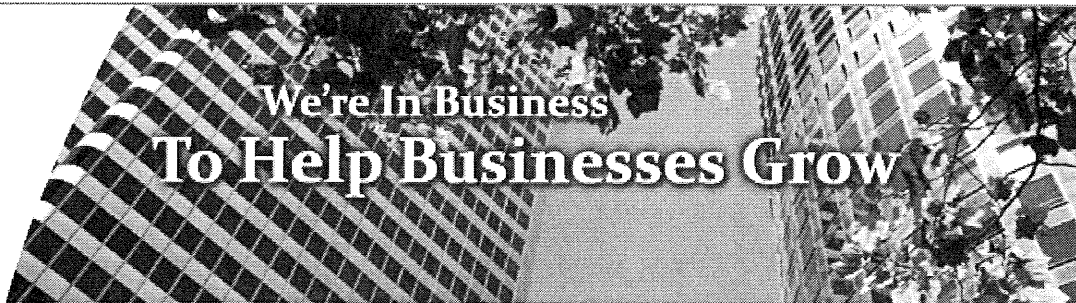
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Amherst Industrial Development Agency
Amherst Development Corporation



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Section II: Project Description & Details

Location of proposed project facility

Address 1765, 1785 & 1805 Maple Road

City Amherst

State New York

Zip Code 14221

SBL Number 56.19-6-7; 56.19-6-6; 56.

* If available please include a copy of current tax bill.

Town/City/Village Williamsville

School District Williamsville

Present Project Site Owner Michael & Josette Wahl

Please provide a brief narrative of the project

See attached.

Site Characteristics

Is the proposed Project located on a site where the known or potential presence of contaminants is complicating the development/use of the property?

Yes No

If yes, please explain

Tax Incentive Application
MEL Investors, LLC
February 25, 2013

Narrative Description

The Maple Road Senior Apartments shall entail the construction of a single, three-story, wood frame, fully sprinklered apartment building for senior citizens capable of living independently. The building will be located at 1765-1805 Maple Road and encompass a mixture of one and two bedroom apartments totaling 99 units. As part of the construction of the apartment building, off street parking spaces shall be implemented on the property.

Apartments shall be equipped with a refrigerator, stove, microwave and dishwasher. The building will also feature community rooms, laundry facilities, a beauty parlor, lounges, an exercise room, staff offices and an elevator.

Construction of the apartment building shall commence upon receipt of the necessary approvals and will be completed approximately twelve months thereafter.

There is a strong need for affordable housing for senior citizens in the Town of Amherst, Erie County and throughout New York State. According to the 2010 census, there are 29,296 people 60 years of age or greater who reside in the Town of Amherst. A lack of affordable housing units for senior citizens within the Town may ultimately force elderly persons to seek affordable housing in other Villages, Towns, Counties or states. Our target market is a senior citizen 60 years of age or greater who earns approximately 60-90% of the area median income. We have found that this segment of the senior population is largely unserved.

There are subsidized housing opportunities for senior citizens, such as apartments financed through HUD's Section 202 program, for senior's whose income is at or below 50% of the area median. There are also projects financed through the New York State Low Income Housing Tax Credit (NYSLIHTC) program that provide affordable housing opportunities for seniors earning less than 60% of the area median income. The seniors we hope to serve are not eligible to live in the buildings financed through HUD or the NYSLIHTC program because they make too much money. However, senior in our target market cannot afford assisted living opportunities that may be available since assisted living facility rents are typically \$2,000 to \$4,000 a month.

The applicant is seeking a sales tax exemption on the purchase of construction materials and the furniture, fixtures and equipment associated with the project. Additionally, the applicant is seeking exemption from mortgage recording tax and a Payment In Lieu of Tax Agreement (PILOT). Without these benefits, the rents at the apartment building would increase by approximately two hundred dollars per unit and the project will not be viable economically.

The PILOT agreement shall provide property tax relief for a period of seven years. Upon the expiration of the term associated with the PILOT, the apartment building will pay full tax. The special district taxes shall not be applicable to the PILOT. Since the apartment building will be occupied by senior citizens, the building will not generate additional students for the school system.

Tax Incentive Application
MEL Investors, LLC
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The project shall provide approximately 52 construction jobs and three and a half permanent jobs upon completion of the construction.

But for Amherst Industrial Development Agency participation, the proposed project will not proceed and is not economically viable. The Town of Amherst and Erie County senior population would lose the benefit of the creation of jobs during the construction period and the jobs created upon the completion of construction. In addition, the town of Amherst and Erie County would lose the benefit of the creation of 99 affordable housing units for senior citizens within the town, which may ultimately force seniors to move out of the town of Amherst, Erie County and the State of New York. Further, the Town, County and School District would lose the benefit of the additional tax revenue generated by the project.

The implementation of the apartment building for senior citizens would result in a tax revenue increase of several multiples even when factoring the PILOT agreement. In its first year of operation when the amount of real estate tax the project generates is at its lowest level, the apartment building will generate more than three times the amount of real estate tax generated by the properties current use. Over the life of the PILOT agreement the apartment building will generate over five times the real estate tax revenue generated by the properties current use and over a ten year period the property will generate more than ten times the tax revenue generated by the properties current use. Further, seniors who may sell their home to move into the apartment building will likely sell their home to a younger couple, thus removing the home's eligibility for enhanced star or other tax reduction programs designed to assist elderly homeowners.

The apartment building will serve a largely unmet need in the Town of Amherst and Erie County through the provision of a quality housing opportunity for senior citizens that is new, safe, affordable, specifically designed for senior citizens and professionally managed.

Has a Phase I Environmental Assessment been prepared, or will one be prepared with respect to the proposed Project Site? (If yes, please provide copy)

Yes No

If yes, please provide a copy.

Have any other studies, or assessments been undertaken with respect to the proposed Project Site that indicate the known or suspected presence of contamination that would complicate the site's development?

Yes No

If yes, please provide copies of the study.

Will project include leasing any equipment?

Yes No

If yes, please describe equipment and lease terms.

If you are purchasing new machinery and equipment, does it provide demonstrable energy efficiency benefits?

Yes No

If yes, please attach additional documentation describing the efficiencies achieved.

Does or will company perform substantial research and development activities on new products/services at the project location?

Yes No

If yes, please explain.

What percentage of annual operating expenses are attributed to the above referenced research and development activities?

Zero

Explain in detail why IDA participation is necessary for this project to proceed. Focus on competitiveness issues, project shortfalls, etc. (attach additional pages if necessary)

See attached.

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Tax Incentive Application
MEL Investors, LLC
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Necessity of IDA Participation

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The applicant is seeking a sales tax exemption on the purchase of construction materials and the furniture, fixtures and equipment associated with the project. Additionally, the applicant is seeking exemption from mortgage recording tax and a Payment In Lieu of Tax Agreement (PILOT). Without these benefits, the rents at the apartment building would need to increase by approximately two hundred dollars per unit to avoid project shortfalls. The increased rents would place the apartment building at a competitive disadvantage and render it economically unviable.

The PILOT agreement shall provide property tax relief for a period of seven years. Upon the expiration of the term associated with the PILOT, the apartment building will pay full tax. The special district taxes shall not be applicable to the PILOT. Since the apartment building will be occupied by senior citizens, the building will not generate additional students for the school system.

But for Amherst Industrial Development Agency participation, the proposed project will not proceed and is not economically viable. The Town of Amherst and Erie County senior population would lose the benefit of the creation and retention of construction jobs during the construction period and the jobs created upon the completion of construction. In addition, the town of Amherst and Erie County would lose the benefit of the creation of 99 affordable housing units for senior citizens within the town, which may ultimately force seniors to move out of the town of Amherst, Erie County and the State of New York. Further, the Town, County and School District would lose the benefit of the additional tax revenue generated by the project.

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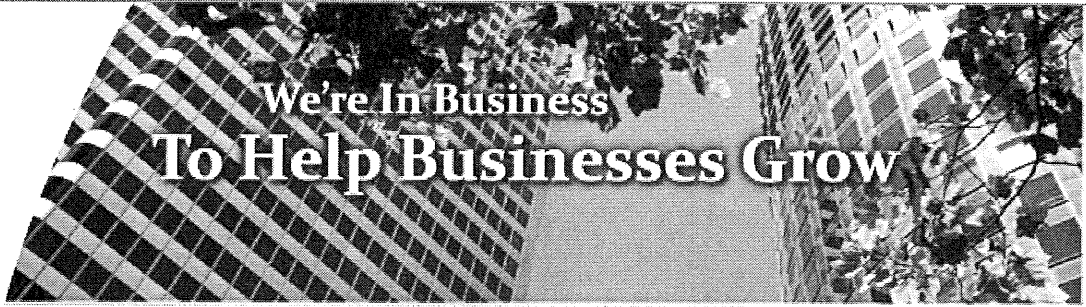
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Project Information

Estimated costs in connection with project

Land and/or Building Acquisition

\$ 900000 0.00 square feet 4.32 acres

New Building Construction

\$ 6735000 110.00 square feet

New Building addition(s)

\$ 0 0.00 square feet

Renovation

\$ 0 0.00 square feet

Manufacturing Equipment

\$ 0

Non-Manufacturing Equipment: (furniture, fixtures, etc.)

\$ 65000

Soft Costs: (professional services, etc.)

\$ 1175000

Other Cost

\$ 0

Explain Other Costs

Total Cost 1088

Project Refinancing (est. amount) 0

Select Project Type (check all that apply)

- Industrial Multi-Tenant Mixed Use

- Acquisition of Existing Facility Commercial Facility for the Aging
- Housing Back Office Civic Facility (not for profit)
- Equipment Purchase Retail Other

SIC Code

NAICS Code

For proposed facility please include # of sq ft for each of the uses outlined below

- Manufacturing/Processing square feet
- Warehouse square feet
- Research & Development square feet
- Commercial square feet
- Retail square feet
- Office square feet
- Other square feet
- Specify Other

Utilities and services presently serving site. Provide name of utility provider

Gas

Electric Size

Water Size

Sewer Size

Other (Specify)

If you are undertaking new construction or renovations, are you seeking LEED certification from the US Green Building Council?

- Yes No

If you answered yes to question above, what level of LEED certification do you anticipate receiving? (Check applicable box)

- Standard Silver Gold Platinum

What is your project timetable (Provide dates)

Start date : acquisition of equipment

End date : Estimated completion of project

Project occupancy : estimated starting date of operations

Have site plans been submitted to the appropriate planning department for approval?

Yes No

If yes, submit a copy of approval with application.

Have any expenditures already been made by the company?

Yes No

If yes, indicate particulars (Amherst IDA benefits do not apply to expenses incurred prior to Board approval)

Is project necessary to expand project employment?

Yes No

Is project necessary to retain existing employment?

Yes No

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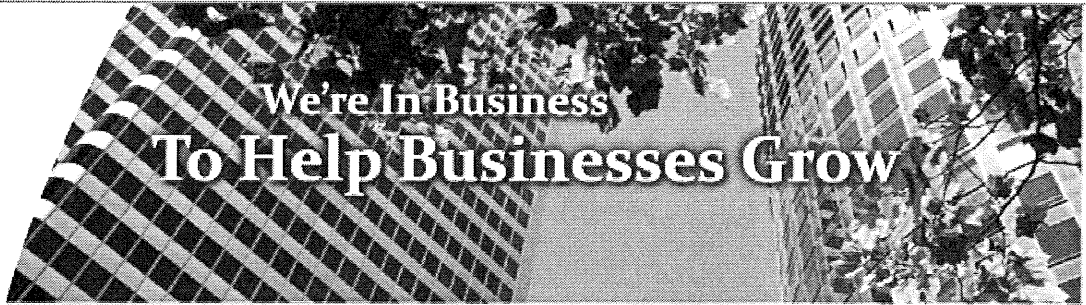
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Employment Plan (project location)

	Current Jobs	If project is to retain jobs, number of jobs to be retained	Total # of jobs 2 years after project completion
Full time	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="3"/>
Part time	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="1"/>

If you estimated new job growth over the next 2 years, please provide a short description of how those estimates were calculated (i.e. jobs per square foot, new contracts/increased revenues, etc.)

Developer has implemented apartment buildings similar to the apartment building proposed within this application. Historically, employment requirements have been similar to the above.

Current Full Time Jobs in other Erie county locations

Current Part Time Jobs in other Erie county locations

Payroll Information

Annual payroll

Estimated average annual salary of jobs to be retained

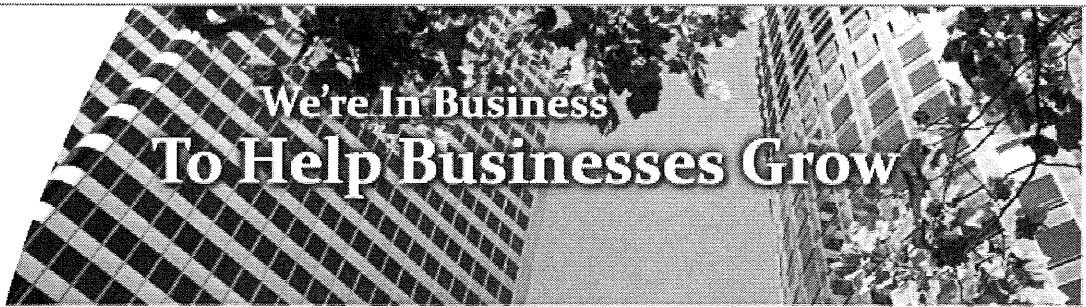
Average estimated annual salary of jobs to be created

Estimated salary range of jobs to be created

From To

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Section III: Adaptive Reuse Projects

Adaptive Reuse is the process of adapting old structures or sites for new purposes.

If NOT applying under adaptive reuse, please 'Save and Continue' to the next section (Section IV : Retail Determination).

Are you applying for a tax incentive under the Adaptive Reuse Program?

Yes No

If No, please proceed to Section IV.

What is the age of the structure (in years)?

Has the structure been vacant or underutilized for a minimum of 3 years? (Underutilized is defined as a minimum of 50% of the rentable square footage of the structure being utilized for a use for which the structure was not designed or intended)

Yes No

If yes, number of years vacant?

Is the structure currently generating insignificant income? (Insignificant income is defined as income that is 50% or less than the market rate income average for that property class)

Yes No

Does the site have historical significance?

Yes No

Briefly summarize the financial obstacles to development that this project faces without Amherst IDA or other public assistance. Please provide the Amherst IDA with documentation to support the financial obstacles to development (cash flow projections documenting costs, expenses and revenues indicating below average return on investment rates compared to regional industrial averages)

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Section IV: Retail Determination

To ensure compliance with the Uniform Tax Exemption Policy (UTEP), the industrial development agencies of Erie County have prepared the following questions for projects involving retail sales, as defined in the 1993 IDA Reform Law.

Upon review of this information, the Agency may find it necessary to request additional written information. Should additional information be required, the Agency will not formally consider any request for financing assistance until this information is received in its entirety.

Will project involve the sales of goods or services to customers who personally visit the facility?

Yes No

If yes, complete the Retail Questionnaire Supplement below. **If no, proceed to Section V.**

Will any portion of the project consist of facilities or property that is primarily used in making sales of goods or services to customers who personally visit the project site?

Yes No

If the answer is yes, please continue.

What percentage of the cost of the project will be expended on such facilities or property primarily used in making sales of goods or services to customers who personally visit the project?

%

If the answer to this is **less than 33%** do not complete the remainder of the page and save and continue to the next section (Section V: Inter-Municipal Move Determination).

Will the project be operated by a not-for-profit corporation?

Yes No

Is the project likely to attract a significant number of visitors from outside the economic development region in which the project will be located?

Yes No

If yes, please provide a market analysis or other documentation supporting your response.

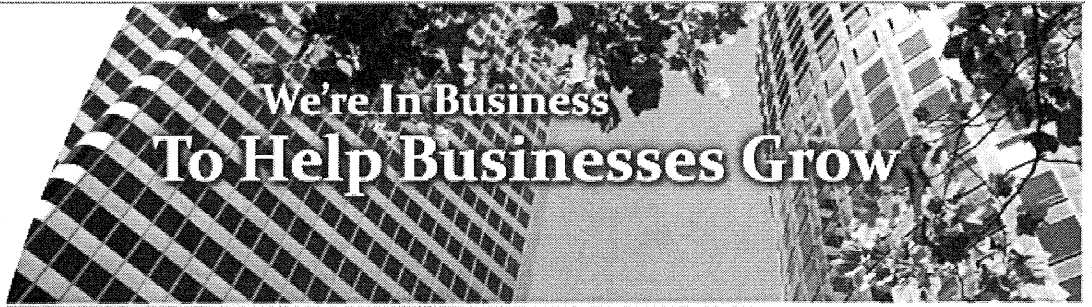
Would the project occupant, but for the contemplated financial assistance from the industrial development agency, locate the related jobs outside the State of New York?

Yes No

If yes, please provide documentation regarding investigation of sites outside New York State.

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Section V: Inter-Municipal Move Determination

Does this project involve relocation or consolidation of a project occupant from another municipality or abandonment of an existing facility?

Within New York State Yes No

Within Erie County Yes No

If 'Yes' is selected for either, please complete the following form questions. If BOTH ARE 'NO', please click 'save and continue' to the next section (Section VI: Facility Type - Single or Multi Tenant).

The Agency is required by state law to make a determination that Agency assistance is required to prevent the project occupant from relocating out of the state, or to preserve the project occupant's competitive position in its respective industry.

Will the project result in a relocation of an existing business operation from the City of Buffalo?

Yes No

If yes, please explain the factors which require the project occupant to relocate (For example, present site is not large enough, or owner will not renew leases etc.)

What are some of the key requirements the project occupant is looking for in a new site? (For example, minimum sq. ft., 12 foot ceilings, truck loading docs etc...)

If the project occupant is currently located in Erie County and will be moving to a different municipality, has the project occupant attempted to find a suitable location within the municipality?

Yes No

Is the project reasonably necessary to preserve the project occupant's competitive position in its industry?

Yes No

If yes, please explain and provide supporting documentation.

What factors have lead the project occupant to consider remaining or locating in Erie County?

What is going to happen to the current facility that project occupant is located in?

Please provide a list of properties considered, and the reason they were not adequate. (Some examples include: site not large enough, layout was not appropriate, did not have adequate utility service, etc.) Please include full address for locations.

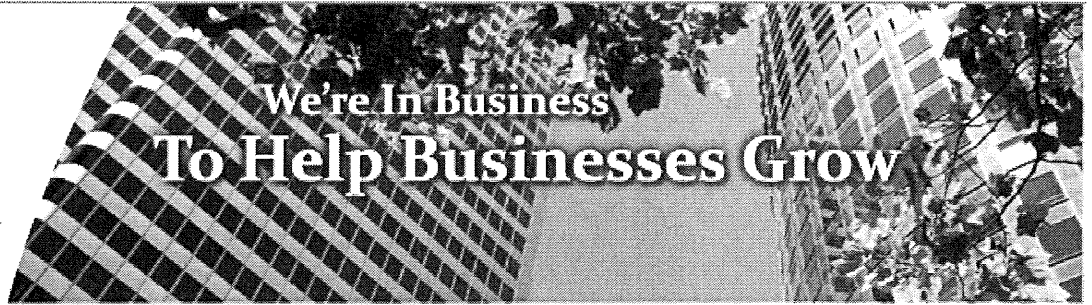
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Section VI: Facility Type - Single or Multi Tenant

Is this a **Single Use Facility** or a **Multi-Tenant Facility**?

Single Use Facility Multi-Tenant Facility

For Single Use Facility

Occupant Name	Limited Liability Company To Be Formed
Address	8610 Transit Road, East Amherst, New York 14051
Contact Person	Michael Connors
Phone	716-204-2918
Fax	716-204-2911
E-Mail	mconnors@blissconstruction.net
Federal ID #	TBD
SIC/NAICS Code	53111

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Attachments

[Tenant Form](#) – Please complete one form for each proposed tenant and return to your business development officer.

[Short Environmental Assessment Form](#) – This form must be filled out, signed and returned to your business development officer.

[Representations, Certifications and Indemnification](#) – This form must be signed and returned to your business development officer.

[Amherst IDA Attorneys' and Amherst IDA Standard Fee Schedule](#) – This item is for your reference, it does not have to be submitted with your application.

Please check here to acknowledge that you have read and understand the Amherst IDA Attorneys' and Amherst IDA Standard Fee Schedule.

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