



California Film & Television Tax Credit Program 2.0

APPLICATION CHECKLIST

Independent Productions

Important: Please carefully review [Guidelines](#) and [Budget/Tagging Instructions](#) regarding this list. All applicants should prepare items listed below prior to submitting an application. **If your project is selected, you will have only 3 days to submit all documents listed below.** All required materials must be uploaded via the online application portal. **PREPARE IN ADVANCE.**

APPLICATION - PHASE II REQUIRED DOCUMENTS

- | | | |
|--------------------------|----------|---|
| <input type="checkbox"/> | 1 | Budget - in an industry standard budgeting format containing QUALIFIED EXPENDITURES ONLY |
| <input type="checkbox"/> | 2 | One-line shooting schedule - with scene descriptions; indicate out of zone and production facility days, if applicable (Production Board or Production Calendar for TV Series) - PDF file |
| <input type="checkbox"/> | 3 | Screenplay - PDF file |
| <input type="checkbox"/> | 4 | Financing "backup" documents - evidencing at least 60% of the financing for the total production budget (e.g. bank or brokerage statements, commitment letters) - PDF file |
| <input type="checkbox"/> | 5 | Detailed Narrative Statement - a statement, on letterhead, establishing that the tax credit is a significant factor in the applicant's choice of location for the project; include information about whether the project is at risk of not being filmed or, specify the jurisdiction where the project will be located in absence of the credit; the statement must be signed by an officer or executive of the applicant - PDF file |
| <input type="checkbox"/> | 6 | Relocation Statement - letter on letterhead certifying that the tax credit is the primary reason for relocation to California; applicable only for Relocating TV Series applicants; if submitting Relocating Statement, do not submit Detailed Narrative Statement (as above) - PDF file |
| <input type="checkbox"/> | 7 | Pick-up Order (Pilots & New TV Series) - for TV series applicants, indicate number of episodes. - PDF file |
| <input type="checkbox"/> | 8 | If available, financial Information, including but not limited to, the most recently produced balance sheets, annual statements of profits and losses, audited or unaudited financial statements, summary budget projections or results - PDF file |
| <input type="checkbox"/> | 9 | List of names of all partners in a partnership or names of all members of a limited liability company (classified as a partnership not publicly traded for California income tax purposes) - PDF file |

Applicants who fail to provide the requested documentation will be ineligible.