

Soundstage Filming Tax Credit Program Applicant Checklists

PHASE A APPLICATION CHECKLIST	
<input type="checkbox"/> 1	Phase A Application: Fill out Phase A Application available on CFC website.
2	Phase A supporting documentation to be submitted with the application:
<input type="checkbox"/>	<ul style="list-style-type: none"> • Certified Studio Construction Project Verification Report prepared by an approved CPA.
<input type="checkbox"/>	<ul style="list-style-type: none"> • Project Labor Agreement, if applicable.
<input type="checkbox"/>	<ul style="list-style-type: none"> • A description of the studio construction project for which certification is sought, including a map with each soundstage identified by name or number as well as identification of any ancillary buildings.
<input type="checkbox"/>	<ul style="list-style-type: none"> • A listing of any and all foundation permits or structural building permits for the studio construction project, including the dates they were issued.
3	Issuance of Soundstage Certification Letter: CFC shall notify approval within 30 days of submission of complete Phase A Application.

PHASE B APPLICATION CHECKLIST	
<input type="checkbox"/> 1	Phase B Application: Fill out Phase B Application available on CFC website.
2	Certification: CFC shall notify approval after reviewing Phase B Application.
3	Phase B Additional Materials and Supporting Documentation: Within 3-7 business days, the applicant must supply the following:
<input type="checkbox"/>	<ul style="list-style-type: none"> • Electronic copy of the Qualified Expenditure Budget: This shall be uploaded to the Portal, when operational. See 10 CCR §5535 for requirements.
<input type="checkbox"/>	<ul style="list-style-type: none"> • Fringe Benefit Matrix: Submit information on fringe benefit payments included in the qualified expenditure budget.
<input type="checkbox"/>	<ul style="list-style-type: none"> • One-Line Schedule: Submit PDF and include which days are scheduled for filming outside of LA Zone.
<input type="checkbox"/>	<ul style="list-style-type: none"> • Screenplay: Submit PDF. (Waived for a pilot without a script, or for recurring series.)
<input type="checkbox"/>	<ul style="list-style-type: none"> • Documentation confirming at least 60% of financing: Submit PDFs including documentation for each financing source (Commitment letters, financing agreements, term sheets, bank statements, etc.)
<input type="checkbox"/>	<ul style="list-style-type: none"> • Pick-up Order: Submit PDF evidence that series has been scheduled for photography.
<input type="checkbox"/>	<ul style="list-style-type: none"> • Narrative Statement: A statement establishing that the tax credit is a significant factor in the applicant's choice of location for the qualified motion picture.
<input type="checkbox"/>	<ul style="list-style-type: none"> • Relocation Statement: If relocation to CA, a statement establishing that the credit is the primary reason for relocation.

PHASE B APPLICATION CHECKLIST	
<input type="checkbox"/>	<ul style="list-style-type: none"> • Unlawful Harassment Policy: Submit the applicant's written Unlawful Harassment policy.
<input type="checkbox"/>	<ul style="list-style-type: none"> • Summary of programs to increase representation of women and minorities: For minorities and women in the job classifications that are not included in qualified wages
<input type="checkbox"/>	<ul style="list-style-type: none"> • Company and Financial Information: Balance sheets, annual statements of profits and losses, audited or unaudited financial statements, summary budget projections or results, or the functional equivalent.
<input type="checkbox"/>	<ul style="list-style-type: none"> • Diversity Workplan: Submit a description of production-specific diversity goals and the plan to achieve the stated goals. See 10 CCR §5534, and §5537 for requirements.
4	<p>Credit Allocation Letter (CAL): Within 30 days of the submission of all Phase B Documents, the CFC shall notify approval and issue the CAL indicating the amount of tax credits allocated.</p>
<input type="checkbox"/> 5	<p>Contribution to Career Pathways Training Program: Applicant shall make a contribution based on 0.5% of the estimated tax credit submitted no later than 30 days after the CAL issue date.</p>
<input type="checkbox"/> 6	<p>Orientation Meeting: As soon as feasible, but no less than 4 weeks before production begins, the production accountant and any appropriate personnel shall schedule and attend an orientation meeting with the CFC Director.</p>
<input type="checkbox"/> 7	<p>Daily Call Sheet: On the first day of principal photography, email a copy of the call sheet signed by the production manager.</p>
<input type="checkbox"/> 8	<p>Participation in career-based learning and training programs: Applicant must complete any of the 6 options to meet this requirement and submit evidence of completion.</p>

PHASE C VERIFICATION CHECKLIST	
1	Phase C Documents: Upon completion of the qualified motion picture, the Phase B applicant shall provide the following:
<input type="checkbox"/>	• Proof of copyright registration of the screenplay.
<input type="checkbox"/>	• Documentation indicating date of completion of post-production.
<input type="checkbox"/>	• List of all Cast and Crew
<input type="checkbox"/>	• Copy of Script Supervisor's Lined Script (TV series must submit episodes 2 and 5.)
<input type="checkbox"/>	• Expenditure Summary Report: Applicant shall submit this report to the CPA performing the AUP Report.
<input type="checkbox"/>	• Agreed Upon Procedures (AUP) Report: AUP shall be prepared by an approved CPA.
<input type="checkbox"/>	• Final Diversity Report as required by 10 CCR §5537
<input type="checkbox"/>	• Actual layout of main and end titles.
<input type="checkbox"/>	• Documentation indicating dollar amount of work performed by visual effects, title, digital effects, and/or post-sound companies in CA.
<input type="checkbox"/>	• Documentation from CCCCCO and/or CDE verifying required participation in career-based learning and training program.
<input type="checkbox"/>	• For miniseries/limited series: Documentation verifying initial distribution consists of 2 or more episodes longer than 40 minutes each.
<input type="checkbox"/>	• Listing of other jurisdictions where production by the applicant has taken place in the preceding year.
<input type="checkbox"/>	• Documentation verifying fee paid for Career Pathways Training Program.