

4. The name of each person who holds at least five percent of the outstanding shares of stock of the applicant.

<i>Name</i>	<i>Percentage of shares</i>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

5. A list of all divisions, subsidiaries and facilities of any parent company.

6. A financial statement for the applicant, subsidiary, and any parent company for each of the preceding three years, prepared by a certified public accountant in accordance with generally accepted accounting principles, including the following information about the applicant, subsidiary, and any parent company:

- 1. Volume of sales;*
- 2. Operating profits;*
- 3. Book value of plant, land and equipment;*
- 4. Net capital investments;*
- 5. Net assets;*
- 6. Capacity utilization; and*
- 7. Liabilities, itemized by the following categories: Loans, mortgages, unfunded pension liabilities, unfunded environmental liabilities, other unfunded liabilities.*

7. Whether the business for which tax abatement is being requested has other operations in Indiana; and, if so, the location of other operations.

<i>Name</i>	<i>Location of operation</i>
_____	_____
_____	_____
_____	_____
_____	_____

8. A description of the product(s) manufactured by the applicant.

9. A description, in as much detail as possible, of the impact on the applicant's business (e.g., loss of jobs, production, contract cancellations, etc.) if the proposed project is not undertaken.

10. The name, title, address and telephone number of the person to which annual tax abatement compliance surveys should be sent.

11. Address of the property for which tax abatement is being requested.

12. Whether the applicant currently conducts operations at this location; and, if so, how long the applicant has been at this location.

No Yes, _____

13. Whether building permits have been obtained or construction started.

No Yes

14. The current zoning of the property, and the case approval number of any variance, rezoning or approval petition which is/are required or has/have been obtained for this project.

15. The size of the subject real estate.

_____ acres

16. Whether the property is currently developed or undeveloped.

Developed Undeveloped

17. Property tax assessment and payment information for the subject real estate.

18. A description of the project for which tax abatement is requested.

19. A list of all public subsidies received by the applicant, subsidiary, or the parent company during the preceding ten years on the facility for which a deduction is sought, or for any other facility that is owned by the applicant, subsidiary or the applicant's parent company and is located in Indiana. The list must include:

1. *The type of subsidy received (such as property tax deduction, industrial revenue bonds, urban action grants, and job training funds);*
2. *The amount of the subsidy;*
3. *Term of the subsidy; and*
4. *The public benefit that was promised when the subsidy was applied for (such as infrastructure or the creation or retention of jobs), and the current number of jobs, including wages and fringe benefits, created or retained as a result of the subsidy.*

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20. A description of the construction jobs resulting from the proposed development, rehabilitation or installation of new manufacturing equipment.

21. A description of the permanent jobs resulting from the proposed development, rehabilitation or installation of new manufacturing equipment, including:

- 1. The estimated total number of jobs that will be held by Portage residents;*
- 2. The number and category of full-time and part-time employees currently employed by the facility;*
- 3. Anticipated date for hiring to begin; and*
- 4. Quarterly hiring projections from project completion date until hiring completion date.*

22. A description of the jobs that will be lost as a result of the proposed redevelopment, rehabilitation or installation of new manufacturing equipment, including:

- 1. The estimated number of jobs that will be lost;*
- 2. The title and occupation skill levels of those jobs; and*
- 3. The wages and fringe benefits of those jobs.*

23. A description of jobs that will be temporarily or permanently restructured, reclassified or reassigned as a result of the proposed redevelopment, rehabilitation or installation of new manufacturing equipment, including:

1. *The lengths of tenure and estimated number of jobs that will be restructured, reclassified or reassigned;*
2. *The titles and occupational skill levels of those jobs; and*
3. *The wages and fringe benefits of those jobs.*

24. Whether applicant's employees are represented by a union; and, if so, by whom. If not, will applicant pay prevailing wage?

Yes, _____ No, _____

25. Total number of existing employees (permanent full-time).

26. Total number and percentage of existing employees (permanent full-time) from Portage.

_____ % _____

27. Total number and percentage of existing employees (permanent full-time) from Porter County.

_____ % _____

28. Current and/or anticipated number of full-time permanent hourly employees by skill level (include average hourly wage rate excluding benefits and overtime).

_____ Skilled	\$_____ Average Wage Rate
_____ Semi-skilled	\$_____ Average Wage Rate
_____ Clerical	\$_____ Average Wage Rate

29. Current and/or anticipated number of salaried employees, indicating average compensation, excluding benefits.

_____ Employees \$_____ Average Compensation

30. Approximate value of benefits for existing and new employees on a per-hour basis.

\$ _____/hour

31. The average hourly wage rate, excluding benefits and overtime, for:

\$ _____ Current hourly employees.

\$ _____ Retained hourly employees.

\$ _____ New hourly employees.

32. Name, title and telephone number of person to be contacted concerning employment and hiring.

33. The local media that will be used for job advertisement.

34. The Portage location that will be used for interviews.

35. Whether any additional public facilities will be needed for the project; and, if so, a description of those facilities.

36. Whether the equipment or the business itself is new to Indiana or is being moved from an existing Indiana location.

New

Existing, _____

37. Whether the equipment for which abatement is requested represents a technological advance over similar equipment in Portage, Porter County and Northwest Indiana.

38. Whether the applicant will occupy an existing facility or construct a new facility.

39. Whether Portage's highly skilled work force will receive priority consideration for new job vacancies and whether non-Portage/Porter County residents will receive the next priority.

40. How Portage/Porter County residents will be made aware of job openings.

41. Where interviews for new job openings will be conducted.

42. Whether the new jobs to be created are skilled or unskilled positions.

Skilled Unskilled Both

43. Whether the applicant's business is environmentally advantageous, neutral or disadvantageous.

Advantageous Neutral Disadvantageous

44. Whether the applicant's business contributes to the diversification of the local economy.

45. Whether applicant will use a project labor agreement for the construction of the project.

46. Whether the applicant will abide by the city's strike and replacement worker resolution.

47. Whether applicant, any subsidiary or parent company, has pending litigation or liabilities with the EPA, OSHA, IOSHA, NLRB or EEOC.

48. Whether applicant, any subsidiary or parent company has a pending tax appeal.

49. Whether applicant will sign a memorandum of agreement with the city if tax abatement is granted.
