

**Attention Applicants:**

On March 28, 2013, New York State established new recordkeeping, reporting, and recapture requirements for Industrial Development Agency (“IDA”) projects that receive sales tax exemptions.

The new NYS sales tax recording and reporting requirements for IDAs include:

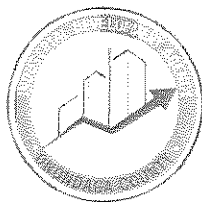
- ◆ Maintaining records of the amount of sales tax benefits provided to each project and making those records available to the State upon request.
- ◆ Reporting to NYS, within 30 days after providing financial assistance, the amount of sales tax benefits provided to the project.
- ◆ Posting on the internet and making available without charge copies of an IDA's resolutions and project agreements.

The statute now requires IDAs to recapture NYS sales tax benefits when:

- ◆ The project was not entitled to receive those benefits;
- ◆ The exemptions exceed the amount authorized, or are claimed for unauthorized property or services; and
- ◆ The project operator failed to use property or services in the manner required by its IDA agreements.

**What this means for OCIDA projects:**

- ◆ **Please ensure that you provide a realistic estimate; the new regulations require OCIDA to recapture any benefit that exceeds the amount listed in a company's application. Therefore, please provide a realistic estimate of the sales tax exemption your company anticipates receiving.**
- ◆ Projects subject to recapture must remit payment within 20 days of OCIDA's request.
- ◆ All project agreements and resolutions will now be publicly available on OCIDA's website (<http://syracusecentral.com/idameetingmaterials.aspx>).



## ONONDAGA COUNTY INDUSTRIAL DEVELOPMENT AGENCY APPLICATION INSTRUCTIONS

1. Fill in all blanks, using "none", "not applicable" or "not available" where the question is not appropriate to the Project, which is the subject of this Application (the "Project"). If you have any questions about the way to respond, please call the Agency at (315) 435-3770.
2. If an estimate is given as the answer to a question, put "(est.)" after the figure or answer, which is estimated.
3. If more space is needed to answer any specific question, attach a separate sheet.
4. When completed, return this application by mail or fax to the Agency at the address indicated below. A signed application may also be submitted electronically in PDF format to the Agency Secretary, Honora Spillane at [hspillane@ongov.net](mailto:hspillane@ongov.net). **An application will not be considered by the Agency until the application fee has been received.**
5. The Agency will not give final approval for this Application until the Agency receives a completed NYS Full Environmental Assessment Form concerning the Project, which is the subject of this Application. The form is available at <http://syracusecentral.com/Economic-Development-Services-Industrial-Development-Agency.aspx>.
6. Please note that Article 6 of the Public Officers Law declares that all records in the possession of the OCIDA (with certain limited exceptions) are open to public inspection and copying. If the Applicant feels that there are elements of the Project which are in the nature of trade secrets which, if disclosed to the public or otherwise widely disseminated, would cause substantial injury to the Applicant's competitive position, this Applicant must identify such elements in writing and request that such elements be kept confidential. In accordance with Article 6 of the Public Officers Law, the OCIDA may also redact personal, private, and/or proprietary information from publicly disseminated documents.
7. The Applicant will be required to pay the Agency Application fee and, if accepted as a project of the agency, all administrative and legal fees as stated in Section V (H) of the Application.
8. A complete application consists of the following eight items:
  - ◆ The Application
  - ◆ Employment Plan - Appendix A.
  - ◆ Conflict of Interest Statement - Appendix B
  - ◆ Local Access Agreement - Appendix C
  - ◆ Description of project, Site Plans/Sketches, and Maps if necessary
  - ◆ NYS Full Environmental Assessment Form
  - ◆ A check payable to the Agency in the amount of \$1000
  - ◆ A check payable to Gilberti Stinziano Heintz & Smith, P.C. in the amount of \$2,500

**It is the policy of the Agency that any project receiving benefits from the Agency will utilize 100% of local contractors and local labor for the construction period of the project unless a waiver is granted in writing by the Agency.**

Return to:

Julie Cerio  
Executive Director, OCIDA  
333 W. Washington Street, Suite 130  
Syracuse, NY 13202  
Phone: 315-435-3770  
Fax: 315-435-3669

## Onondaga County Industrial Development Agency Application

### I. Applicant Data

#### A. Contact Information

Company Name:	Morgan B Ville Apartments LLC			
Mailing Address:	1080 Pittsford-Victor Road			
City:	Pittsford	State:	New York	Zip: 14534
Phone:	(585) 419-9630	Fax:	(585) 419-9636	
Contact Person:	Kevin Morgan			
Email Address:	kevin.morgan@morganmanagement.com			
Industry Sector:	Commercial Real Estate			

B. Will the Applicant be the Project Beneficiary (i.e. project tenant/company)

- Yes       No

#### C. Principal Stakeholders

List principal owners/officers/directors owning 5% or more in equity holdings with percentage ownership. Public companies should list corporate officers.

Name	% Ownership	Business Address	Phone	Email
Robert C Morgan	100%	1080 Pittsford Victor Road, Pittsford, NY 14534	(585) 419-9630	

D. Corporate Structure: Attach a schematic if Applicant is a subsidiary or otherwise affiliated with another entity.

Corporation

Private

Public

Date and Location of  
Incorporation/Organization

Partnership

General

Limited

If a foreign corporation, is the  
Applicant authorized to do  
business in the State of New  
York?

Not For Profit

Sole Proprietorship

Limited Liability Company/Partnership

(co-counsel)

E. Applicant's Counsel

Name:	Jordan Alaimo				
Firm:	Bond Schoeneck & King				
Mailing Address:	350 Linden Oaks, Suite 310				
City:	Rochester	State:	New York	Zip:	14625
Phone:	(585) 362-4720	Fax:	(585) 362-4670		
Email Address:	ALAIMOJ@bsk.com				

F. Applicant's Accountant

Name:	Mark Blood, CPA				
Firm:	DeJoy, Knauf & Blood LLP				
Mailing Address:	39 State Street, Suite 600				
City:	Rochester	State:	New York	Zip:	14614
Phone:	(585) 546-1840	Fax:	(585) 546-4486		
Email Address:	mblood@teamdkb.com				

G. Has the Project Beneficiary received assistance from OCIDA, New York State or the Onondaga Civic Development Corporation in the past If yes, please give year, project name, description of benefits, and address of project.

Yes

No

E. Applicant's Counsel

Name:	Mike Townsend		
Firm:	Harris Beach PLLC		
Mailing Address:	99 Gamsey Road		
City:	Pittsford	State:	New York
		Zip:	14534
Phone:	(585) 419-8656	Fax:	(585) 419-8815
Email Address:	mtownsend@HarrisBeach.com		

F. Applicant's Accountant

Name:	Mark Blood, CPA		
Firm:	DeJoy, Knauf & Blood LLP		
Mailing Address:	39 State Street, Suite 600		
City:	Rochester	State:	New York
		Zip:	14614
Phone:	(585) 546-1840	Fax:	(585) 546-4486
Email Address:	mblood@teamdcb.com		

G. Has the Project Beneficiary received assistance from OCIDA, New York State or the Onondaga Civic Development Corporation in the past If yes, please give year, project name, description of benefits, and address of project.

Yes       No

**II. Project Information**

A. Location

Address:	197 Downer Street		
City:	Baldwinsville	Village/Town:	
Zip Code:	13027	School District(s):	Baldwinsville Central School District
Tax Map Parcel ID(s):	315601 022.-01-02.4		
Current Assessed Value:	47,800	Square Footage of Existing Building:	N/A

B. Type (Check all that apply):

- |  |  |
|--|--|
| <input checked="" type="checkbox"/> New Construction               | <input checked="" type="checkbox"/> Purchase of machinery and/or equipment |
| <input type="checkbox"/> Expansion/Addition to Current Facility    | <input type="checkbox"/> Brownfield/Remediated Brownfield                  |
| <input type="checkbox"/> Renovation of Existing Facility           | <input type="checkbox"/> LEED Certification                                |
| <input type="checkbox"/> Acquisition of Existing facility/property | <input type="checkbox"/> Other <input type="text"/>                        |

C. Description of Project: Please explain your project in detail. This description should include an explanation of all activities which will occur due to this project, size of the project in square feet, current use of the site and use of the site upon completion of the project. Attach copies of any site plans, sketches or maps. (Attach additional sheets if necessary):

See attached project description

D. Is the Project Beneficiary the owner of the property?

- Yes       No

If not, by what means will the site be acquired? If leasing, when does the lease end?

E. Infrastructure: Please indicate whether the following are onsite, need to be constructed, or need to be renovated/expanded:

Water	To be Constructed	Electric	Needs to be Constructed
Sanitary/Storm Sewer	Needs to be Constructed	Private Roads	Needs to be Constructed
Gas	Needs to be Constructed	Telecommunication	Needs to be Constructed

F. Zoning Classification: Please list current and proposed zoning:

Current Zoning	Residential	Proposed Zoning	Residential
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G. Are variances needed to complete the project?

Yes  No

If yes, please describe nature of variances and if municipal approvals have been granted:

The project is fully approved.

H. What will be the primary use of the project upon completion?

Multi-Family Housing

I. Will the project generate sales tax for the community?

Yes  No

If yes, what is the company's average annual sales or estimated annual sales?

J. Has the project beneficiary sought sites or facilities outside Onondaga County for this project?

Yes  No

K. 1. Will any other companies or related facilities within the state close or be subjected to reduced activity as a result of this project? If so please list the town and county of the location(s):

Yes  No

2. Will the completion of the project result in the removal of a plant or facility of the project occupant from one area of the State of New York to another area of the State of New York?

Yes  No

3. Will the completion of the project result in the abandonment of one or more plants or facilities of the project beneficiary located in the State of New York?

Yes  No

i. If any answer to questions 2 or 3 above is yes, is the project reasonably necessary to discourage the project beneficiary from removing such other plant or facility to a location outside the State of New York?

Yes  No

ii. If any answer to questions 2 or 3 above is yes, is the project reasonably necessary to preserve the competitive position of the project applicant in its respective industry?

Yes  No

4. Will the project primarily consist of recreation, medical, or retail facilities?

Yes  No

i. If yes, will the cost of these facilities exceed one-third of the total project cost?

Yes  No

L. For the Agency to consider this project, please provide the following information:

1. Does the project consist of new construction or expansion or substantial renovation of an existing facility?

Yes  No

2. Will the project create new employment opportunities or retain existing jobs that may otherwise be lost?

Yes  No

3. Does the project beneficiary serve a customer base primarily outside of Onondaga County?

Yes  No

4. Please estimate the approximate savings to be realized by Agency participation and the need for such savings:

Approximately \$ 4.5-5 million dollars

5. Please describe the need for Agency participation and the associated savings

This was a blighted site/demolition of existing structures/removal of existing infrastructure/

6. Please describe any compelling circumstances the Agency should be aware of while reviewing this application:

There is a lack of rental housing in the village of Baldwinsville. There is an acute need for affordable workforce housin

M. Environmental Information

1. The Agency must make a determination of environmental significance for the project. Have any environmental issues been identified on the property?

Yes  No

If yes, please explain:

**\* Please note a full Environmental Assessment Form (EAF) MUST be completed and submitted along with this application.**

2. Has the Town/Village or any public body issued a SEQR determination for this project?

Yes  No

N. Construction

1. Project Timeline (approximate):

Construction Commencement Jul 1, 2015

Construction Completion 36 months

Date of Occupancy Spring 2016

2. Please list any other key project milestones:



III. Project Costs and Financing

A. Estimated Project Costs:

Land	1,800,000
Building Construction/Renovation	\$56,873,574
Site Work	\$7,498,461
Engineering	
Financial Charges	
Legal Fees	
Machinery and Equipment	
Other	
Total Investment	\$66,172,035

B. Total amount of the project being privately financed:

80% of the project total

C. Estimated mortgage amount:

\$52,938,628

D. Company's average yearly purchases or anticipated yearly purchases from vendors within Onondaga County or Central New York:

Total for project approximately \$2,000,000

E. Estimated capital investment over the next 5 years, beyond this project, if available:

F. Financial Assistance sought (estimated values):

Companies requesting a sales tax exemption from OCIDA must provide the value of the sales tax savings they anticipate receiving. **Please ensure that you provide a realistic estimate. New NYS regulations require OCIDA to recapture any benefit that exceeds the amount listed in a company's application.**

<input checked="" type="checkbox"/>	Real Property Tax Abatement (PILOT)	
<input checked="" type="checkbox"/>	Mortgage Tax Exemption	
<input checked="" type="checkbox"/>	Sales and Use Tax Exemption	
<input type="checkbox"/>	Tax Exempt Bond Financing	
<input type="checkbox"/>	Taxable Bond Financing	

IV. Employment and Payroll Information

A. Are there people currently employed at the project site?

Yes

No

If yes, provide number of full time equivalent (FTE) jobs at the facility:

If yes, what is the average annual salary range?

B. Estimate the number of full time equivalent (FTE) jobs to be retained as a result of this project:

C. Estimate the number of full time equivalent (FTE) jobs to be added as a result of this project:

D. Estimate the number of construction jobs to be created by this project:

E. Estimate the average length of construction jobs to be created (months):

F. Planned average hourly wage for new FTE non-management jobs:

G. Estimated average salary for new management FTE jobs:

H. Current annual payroll at Onondaga County facility:

I. Average annual growth rate of wages:

J. Please list, if any, benefits that will be available to either full and/or part time employees:

K. Average annual benefit paid by the company (\$ or % salary) per FTE job to be created:

L. Average growth rate of benefit cost:

M. Amount or percent of wage employees pay for benefits:

**\* Full Time Equivalent (FTE) is defined as one employee working no less than 35 hours per week or two or more employees together working a total of 35 hours per week.**

## V. REPRESENTATIONS BY THE APPLICANT

The Applicant understands and agrees with the Agency as follows:

**A. Jobs Listings:** In accordance with Section 858-b(2) of the New York General Municipal Law, the Applicant understands and agrees that if the Project receives any Financial Assistance from the Agency, except as otherwise provided by collective bargaining agreements, new employment opportunities created as a result of the Project will be listed with the New York State Department of Labor Community Services Division (the "DOL") and with the administrative entity of the service delivery area created by the Workforce Investment Act of 1998 (the "WIA") in which the Project is located.

Initial RCM

**B. First Consideration for Employment:** in accordance with Section 858-b (2) of the New York Municipal Law, the Applicant understands and agrees that if the Project receives any Financial Assistance from the Agency, except as otherwise provided by collective bargaining agreements, where practicable, the Applicant will first consider persons eligible to participate in WIA programs who shall be referred by the WIA Entities for new employment opportunities created as a result of the Project.

Initial RCM

**C. Annual Sales Tax Filings:** In accordance with Section 874(8) of the New York General Municipal Law, the Applicant understands and agrees that if the Project receives any sales tax exemptions as part of the Financial Assistance from the Agency, the Applicant agrees to file, or cause to be filed, with the New York State Department of Taxation and Finance, the annual form prescribed by the Department of Taxation and Finance, describing the value of all sales tax exemptions claimed by the Applicant and all consultants or subcontractors retained by the Applicant.

Initial RCM

**D. Annual Employment Reports and Outstanding Bonds:** The Applicant understands and agrees that if the Project receives any Financial Assistance from the Agency, the Applicant agrees to file, or cause to be filed, with the Agency on an annual basis, reports regarding the number of FTE at this project site. The Applicant also understands and agrees to provide on an annual basis any information regarding bonds, if any, issued by the Agency for the project that is requested by the Comptroller of the State of New York.

Initial RCM

**E. Absence of Conflicts of Interest:** The Applicant has received from the Agency a list of the members, officers and employees of the Agency. No member, officer or employee of the Agency has an interest, whether direct or indirect in any transaction contemplated by this Application, except as hereinafter described in Appendix B.

Initial RCM

**F. Local Access Policy:** The Applicant understands and agrees that local labor and contractors must be used for the construction of the Project, as stated in the Agency Local Access Policy located in Appendix C.

Initial RCM

**G. Fees:** This application should be submitted with a non-refundable \$1000 application fee to the Onondaga County Industrial Development Agency and a \$2,500 legal deposit made out to Gilberti Stinziano Heintz & Smith, P.C.

Initial RCM

The Agency will collect an administrative fee and all remaining legal fees based on the Fee Schedule below:

### Agency Fees:

- ◆ Fee for manufacturing projects under \$10 million - .0075 of the project cost
- ◆ Fee for all agency projects except those with PILOT agreements - .01 of the project cost
- ◆ Additional Fee for PILOT Agreement Projects - .0025 of bond amount or project cost
- ◆ Fee for bond refinancing & refunding - .0025 of refinancing or refunding amount.

### Legal Fees:

- ◆ Fee for first \$20 million - .0025 of project cost
- ◆ Fee for anything above \$20 million - .00125 of project cost

### H. Payment terms:

- Application fee: Payable at the time of application
  - Legal deposit: Payable at the time of application
  - Agency fee for Bond Projects: Payable at Closing
  - Agency and Legal Fees for all other projects: Due and payable at Inducement
- \* A sales tax certificate will generally not be issued until the Agency Fee is paid in full

Initial RCM

**I. Recapture of Tax Abatements/Exemptions:**

Recapture of Benefits. It is the policy of the Agency to recapture the value of Payment in lieu of taxes, State and County Sales Tax and Mortgage Recording Tax Exemptions in accordance with the provisions contained herein and the Laws of the State of New York. Before receiving benefits, projects of the Agency must attest in writing to their understanding of and agreement to the Recapture Provisions of the Agency Uniform Tax Exemption Policy. The recapture provision contained herein may be modified from time to time by the Board at its sole discretion.

Recapture of a PILOT, Sales Tax and the Mortgage Recording Tax Exemptions. In the event the facility is sold or closed, or the number of jobs is reduced below 75% of the number employed or projected to be employed at time of application to the Agency and no substantial future economic benefit is likely to accrue to the community, then the value of the Property Tax, Sales tax and the Mortgage Recording Tax benefits extended to the project by the Agency shall be subject to recapture.

Recapture Payment. The Recapture payment paid by the Project to the Agency shall be determined (1) by the difference between any PILOT payments made by the Project and the property taxes that would be paid by the Project, if the property were not in the ownership or control of the Agency, (2) the value of any Mortgage Recording Tax Exemption, if awarded to the Project and (3) the amount of sales tax that would have been paid if an exemption was not granted.

Recapture of the PILOT, Sales Tax or Mortgage Recording Tax: The Recapture Schedule for a Payment in Lieu of Taxes Agreement, Sales Tax or the Mortgage Recording Tax is as follows:

Within two (2) years of Certificate of Occupancy	100%
Within three (3) years:	80%
Within four (4) years:	60%
Within five (5) years:	40%
Within six (6) years:	30%
Within seven (7) years:	20%
Within eight (8) years:	10%
Eight years or more:	0%

Distribution of the Recapture Payment. Any funds recaptured as the result of an Agreement with the Agency shall be distributed to the affected taxing jurisdictions in the same proportion as if the payments were paid or owed by the Project on the date of recapture.

Additional Conditions for the Recapture of Sales and Use Tax. As of April 1, 2013, New York State law requires Industrial Development Agencies to recapture sales tax benefits where:

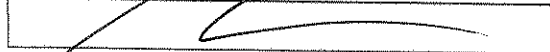
- ◆ A Project is not entitled to receive the benefits
- ◆ Exemptions received exceed the amount authorized by the Agency
- ◆ Exemptions are claimed by the Project for unauthorized property or services
- ◆ A Project fails to use property in the manner required by its IDA agreements

**I have read the foregoing and agree to comply with all the terms and conditions contained therein as well as policies of the Onondaga County Industrial Agency.**

Name of Applicant Company

Morgan B Ville Apartments LLC

Signature of Officer or Authorized Representative



Name & Title of Officer or Authorized Representative

Robert Morgan, Managing Member

Date

Jun 5, 2015

The Applicant and the individual executing this Application on behalf of the Applicant acknowledge that the Agency will rely on the representations made herein when acting on this Application and hereby represent that the statements made herein do not contain any untrue statement of a material fact and do not omit to state a material fact necessary to make the statements contained herein misleading.

I have read paragraph 6 in the instructions and understand that the applicant must identify in writing to OCIDA any information it deems proprietary and requests not be made publicly available.

Please check here if you have marked information as confidential/proprietary

Name of Applicant Company

Morgan B Ville Apartments LLC

Signature of Officer or Authorized Representative

Name & Title of Officer or Authorized Representative

Robert Morgan, Managing Member

Date

Jun 5, 2015

#### VI. Hold Harmless Agreement

Applicant hereby releases Onondaga County Industrial Development Agency and the members, officers, servants, agents and employees thereof (the "Agency") from, agrees that the Agency shall not be liable for, and agrees to indemnify, defend and hold the Agency harmless from and against any and all liability arising from or expense incurred by: (A) the Agency's examination and processing of, and action pursuant to or upon, the attached Application, regardless of whether or not the Application or the Project described therein or the tax-exemptions and other assistance requested therein are favorably acted upon by the Agency, (B) the Agency's acquisition, construction, and/or installation of the Project described therein and (C) any further action taken by the Agency with respect to the Project, including without limiting the generality of the foregoing, all cause of action and attorney's fees and any other expenses incurred in defending any suits or action which may arise as a result of any of the foregoing. If, for any reason, the Applicant fails to conclude or consummate necessary negotiations, or fails, within a reasonable or specified period of time, to take reasonable, proper or requested action, or withdraws, abandons, cancels or neglects the Application, or if the Agency or the Applicant are unable to reach final agreement with respect to the Project, then, and in the event, upon presentation of an invoice itemizing the same, the Applicant shall pay to the Agency, its agents or assigns, all costs incurred by the Agency in the process of the Application, including attorney's fees, if any.

Name of Applicant Company

Morgan B Ville Apartments LLC

Signature of Officer or Authorized Representative

Name & Title of Officer or Authorized Representative

Robert Morgan, Managing Member

Date

Jun 5, 2015

Onondaga County Industrial Development Agency Application  
Appendix A  
Employment Plan  
Part 1

Company Name:	Morgan B Ville Apartments LLC			
Mailing Address:	1080 Pittsford-Victor Road			
City:	Pittsford	State:	New York	Zip: 14534
Phone:	(585) 419-9630	Fax:	(585) 419-9636	
Contact Person:	Kevin Morgan			
Email Address:	kevin.morgan@morganmanagement.com			
Type of Business:	Commercial Real Estate			

Please complete the following chart describing your projected employment plan following receipt of financing:

Current and Planned Full Time Occupations in Company	Current Number Full Time Jobs Per Occupation	Estimated Number of Full Time Jobs After Completion of the Project		
		1 Year	2 Year	3 Year
Property Manager	1	1	0	0
Leasing Agent	2	1	1	0
Superintendent	1	1	0	0
Maintenance Technician	3	1	2	0
Assistant Property Manager	1	0	1	0

Are the employees of your firm currently covered by a collective bargaining agreement?

Yes     
  No     
 If yes, Name and Local:

Indicate whether the labor pool in Onondaga County is adequate to fill new jobs:

Yes     
  No

Under current Industrial Development Agency (IDA) law, an IDA must consider such things as job retention when approving projects.

Name of Applicant Company	Morgan B Ville Apartments LLC
Signature of Officer or Authorized Representative	
Name & Title of Officer or Authorized Representative	Robert Morgan, Managing Member
Date	Jun 5, 2015

ONONDAGA COUNTY INDUSTRIAL DEVELOPMENT AGENCY APPLICATION  
**APPENDIX A**  
**EMPLOYMENT PLAN**  
**PART 2**

*(Enter Company Name in three (3) places below and sign by an authorized company officer)*

In consideration of the benefits provided by the Onondaga County Industrial Development Agency, Morgan B Ville Apartments LLC project beneficiary, agrees to cause any new employment opportunities created in connection with industrial or commercial projects financed by the proceeds of such obligations to be listed with the New York State Department of Labor Community Services Division (DOL) and with the CNY Works.

Morgan B Ville Apartments LLC, project beneficiary, also agrees to report to the Onondaga County Industrial Development Agency on or before March 1 of each year on the status employment opportunities filed with DOL, including the number of new employment opportunities created, the number listed and the number filled for the year ending the prior December 31.

Morgan B Ville Apartments LLC, project beneficiary, further agrees that, to the extent practical and feasible, and subject to the requirements of any existing collective bargaining agreement, shall fill at least ten percent of new employment opportunities with persons eligible for service under the Workforce Investment Act.

Name of Applicant Company

Morgan B Ville Apartments LLC

Signature of Officer or Authorized Representative



Name & Title of Officer or Authorized Representative

Robert Morgan, Managing Member

Date

Jun 5, 2015

ONONDAGA COUNTY INDUSTRIAL DEVELOPMENT AGENCY APPLICATION  
**APPENDIX B**  
**CONFLICT OF INTEREST STATEMENT**

Agency Board Members

1. Dan Queri
2. Steve Morgan
3. Victor Ianno
4. Lisa Dell
5. Patrick Hogan
6. Janice Herzog
7. Jessica Crawford

Agency Officers/Staff

1. Julie Cerio
2. Honora Spillane
3. Chris Cox
4. Karen Doster
5. Steven Coker

Agency Legal Counsel & Auditor

1. Anthony Rivizzigno, Esq., Gilberti Stinziano Heintz & Smith, P.C.
2. The Bonadio Group

The Applicant has received from the Agency a list of members, officers and staff of the Agency. To the best of my knowledge, no member, officer or employee of the Agency has an interest, whether direct or indirect, in any transaction contemplated by this Application, except as hereinafter described:

Signature:



Authorized Representative:

Robert Morgan

Title:

Managing Member

Date:

Jun 5, 2015



ONONDAGA COUNTY INDUSTRIAL DEVELOPMENT AGENCY APPLICATION

APPENDIX C

Local Access Policy Agreement

In absence of a waiver permitting otherwise, every project seeking the assistance of the Onondaga County Industrial Development Agency (Agency) must use local general contractors, sub-contractors, and labor for one-hundred percent (100%) of the construction of new, expanded, or renovated facilities. The project's construction or project manager need not be a local company. All projects of the Agency will be subject to monitoring by the Agency. **Noncompliance may result in the revoking and/or recapture of all benefits extended to the project by the Agency. Local Labor is defined as laborers permanently residing in the State of New York counties of Cayuga, Cortland, Herkimer, Jefferson, Madison, Oneida, Onondaga, Oswego, Tompkins and Wayne. Local (General/Sub) Contractor is defined as a contractor operating a permanent office in the State of New York counties of Cayuga, Cortland, Herkimer, Jefferson, Madison, Oneida, Onondaga, Oswego, Tompkins and Wayne.** The Agency may determine on a case-by-case basis to waive the local access policy for a project or for a portion of a project where consideration of warranty issues, necessity of specialized skills, significant cost differentials between local and non-local services or other compelling circumstances exist.

In consideration of the extension of financial assistance by the Agency

(the Company) understands the Local Access Policy and agrees to complete Appendix C of the Agency application at the time of the application to the the Agency and as part of a request to extend the valid date of the Agency's tax-

exempt certificate for the  project. The Company understands an Agency tax-

exempt certificate is valid for 90 days effective the date of the project inducement and extended for 90 day periods thereafter upon request by the Company. The Company further understands any request for a waiver to this policy must be submitted in writing and approved by the Agency before a tax-exempt certificate is issued or extended.

I agree to the conditions of this agreement and certify all information provided regarding the construction and employment activities for the project as of  (date).

<b>Company</b>	<input type="text"/>	<b>General Contractor</b>	<input type="text"/>
<b>Representative for Contract Bids/Awards</b>	<input type="text"/>	<b>Contact</b>	<input type="text"/>
<b>Address</b>	<input type="text"/>	<b>Address</b>	<input type="text"/>
<b>City:</b>	<input type="text"/>	<b>City:</b>	<input type="text"/>
<b>State:</b>	New York	<b>State:</b>	New York
<b>Zip:</b>	<input type="text"/>	<b>Zip:</b>	<input type="text"/>
<b>Phone</b>	<input type="text"/>	<b>Phone</b>	<input type="text"/>
<b>Fax</b>	<input type="text"/>	<b>Fax</b>	<input type="text"/>
<b>Email</b>	<input type="text"/>	<b>Email</b>	<input type="text"/>
<b>Project Address</b>	<input type="text"/>	<b>Project Address</b>	<input type="text"/>
<b>City</b>	<input type="text"/>	<b>City</b>	<input type="text"/>
<b>ST</b>	Alabama	<b>ST</b>	Alabama
<b>Zip</b>	<input type="text"/>	<b>Zip</b>	<input type="text"/>

Authorized Representative  Robert Morgan Title

Signature

<b>Item</b>	<b>Contract (Sub)</b>	<b>Address</b>	<b>Email</b>	<b>Phone</b>	<b>Amount</b>
Site work/ Demolition					
Foundation & Footings					
Building					
Masonry					
Metals					
Wood/Casework					
Thermal/ Moisture proof					
Doors, windows, glazing					
Finishes					
Electrical					
HVAC					
Plumbing					
Specialities					
Machinery & Equipment					
Furniture & Fixtures					
Utilities					
Paving					
Landscaping					

ONONDAGA COUNTY INDUSTRIAL DEVELOPMENT AGENCY APPLICATION

**Application Attachments Listing**

- ◆ Corporate schematic, if a subsidiary
- ◆ Description of project, Site Plans/Sketches, and Map
- ◆ NYS Full Environmental Assessment Form
- ◆ A check payable to the Agency in the amount of \$1000
- ◆ A check payable to Gilberti Stinziano Heintz & Smith, P.C. in the amount of \$2,500

# Baldwinsville Apartments

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The following is a summary of the terms and conditions that we are requesting.

**Project Background:** This project has been approved for 442 luxury apartments consisting of 17 three story buildings located at 197 Downer St in Baldwinsville, New York. The project will be built in two phases. Phase I will contain 234 units in 9 buildings and the pool with a clubhouse. Phase II will contain 208 units in 8 buildings. The unit mix for phase I consists of 63 one bedroom units with 2 different layouts, 153 two bedroom units with 5 different layouts, and 18 three bedroom units all the same layout.