# Legal Services Trust Fund Program

# Refunding Application Checklist for Legal Services Projects

**Applicant Name:**

Please check your completed application against this list of all materials required for a complete package. Submit the completed checklist on top of your application package.

Your application must be received in the Legal Services Trust Fund Program Office by 5:00 p.m. on Monday, February 3, 2014. You must send the original application, with original signatures, **and** one copy of the application forms. Electronic or fax submissions will not be accepted in lieu of timely receipt of a fully-executed, original hard copy under any circumstances. Forward one set of completed electronic application forms in Microsoft Word and Excel format to trustfundprogram@calbar.ca.gov.

1. **Application materials enclosed:**

|  |  |  |
| --- | --- | --- |
| **[ ]**  | **I.** | Applicant Profile |
| **[ ]**  | **II.** | Eligibility Criteria |
| **[ ]**  | **III.** | Certifications |
|  |  | **[ ]** Income Eligibility Criteria (No. 5.) |
| **[ ]**  | **IV.** | Assurances |
| **[ ]**  | **V.** | Quality Control Review |

1. **Audited/Reviewed Financial Statement is (check the appropriate box):**
2. Enter your program’s fiscal year end:
3. The audited/reviewed financial statement is:

|  |  |
| --- | --- |
| **[ ]**  | Enclosed |
| **[ ]**  | Previously Submitted |

1. If your financial statement is not enclosed or was not previously submitted, enclose a copy of the engagement letter with your certified public accountant agreeing to conduct an audit or review for the last fiscal year. Your audited or reviewed financial statement must be received in the Trust Fund office no later than April 1, 2014.
2. Provide the anticipated date for completion of the financial audit/review:

Your financial audit/review must be submitted as soon as it is available and in no circumstances later than April 1, 2014.

Send one set of completed electronic application materials **ONLY** to trustfundprogram@calbar.ca.gov.