




The addendum can help homeowners obtain refinancing loans more easily, cut property insurance costs, and is an extension of the Uniform Residential Appraisal Report (URAR) that can be incorporated into the MLS and mortgage portals.

Client File #:		
Appraisal File #:		
of the subject property:		
/www.webcore.com		Other: _____
Train Distance: _____ Blocks		Subway Distance: _____ Blocks
Escaping: Water Efficient <input type="checkbox"/> Natural <input type="checkbox"/> Pond/Lake on site <input type="checkbox"/> Rain Garden <input type="checkbox"/>		
if the subject property and based on effective date of value.		
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praised and provide to appraiser prior to the completion of an		
If loan application to assist them in understanding the property this property type will be engaged to provide an appraisal to		

Appraisal Institute's Residential Green Addendum

Page 1 provides the basic details, and an overview of the six core elements for a Green Building. This information can be a 'brag sheet' for existing homes to share the high performance and energy saving features to potential buyers. Completing the addendum on new constructions projects ensures these features are communicated to appraisers, real estate agent and lending partners and provide the appropriate details for proper valuation of energy efficiency and green design features.

Property & Owner Info

 Form 820.06*	Client File #:			Appraisal File #:		
	Residential Green and Energy Efficient Addendum					
	Client:					
	Subject Property:					
	City:		State:		Zip:	

Additional resources to aid in the valuation of green properties and the completion of this form can be found at http://www.appraisalinstitute.org/education/green_energy_addendum.aspx

The appraiser hereby certifies that the information provided within this addendum:

- has been considered in the appraiser's development of the appraisal of the subject property only for the client and intended user(s) identified in the appraisal report and only for the intended use stated in the report.
- is not provided by the appraiser for any other purpose and should not be relied upon by parties other than those identified by the appraiser as the client or intended user(s) in the report.
- is the result of the appraiser's routine inspection of and inquiries about the subject property's green and energy efficient features. Extraordinary assumption: Data provided herein is assumed to be accurate and if found to be in error could alter the appraiser's opinions or conclusions.
- is not made as a representation or as a warranty as to the efficiency, quality, function, operability, reliability or cost savings of the reported items or of the subject property in general, and this addendum should not be relied upon for such assessments.

Green Building: The practice of creating structures and using processes that are environmentally responsible and resource-efficient throughout a building's lifecycle from siting to design, construction, operation, maintenance, renovation, and deconstruction. This practice expands and complements the classic building design concerns of economy, utility, durability, and comfort (US EPA). High Performance building and green building are often used interchangeably.

Six Elements of Green Building: A green building has attributes that fall into the six elements of green building known as (1) site, (2) water, (3) energy, (4) materials, (5) indoor environmental quality, and (6) maintenance and operation. The energy and water elements are the most measurable elements of green or high performance housing. Appraisers need savings amounts to develop an income approach to support energy efficient contributory value.

THIRD-PARTY VERIFICATIONS (See types defined in glossary).

The following verified items are considered within the appraisal analysis of the subject property:

Green Certification Environmental Protection Agency (EPA): <input type="checkbox"/> Indoor airPLUS <input type="checkbox"/> WaterSense <input type="checkbox"/> ENERGY STAR Energy Department (DOE): <input type="checkbox"/> Zero Energy Ready Home (ZERH) Home Innovation Research Labs NGBS Home Remodel: Home Innovation Research Labs NGBS New Home: <input type="checkbox"/> Bronze <input type="checkbox"/> Silver <input type="checkbox"/> Gold <input type="checkbox"/> Emerald Living Building Challenge (LBC): <input type="checkbox"/> Living Building Certified <input type="checkbox"/> Petal Certification Passivhaus Standard: <input type="checkbox"/> PHI Low Energy <input type="checkbox"/> EnerPhit <input type="checkbox"/> Passive House Passive House Institute US: <input type="checkbox"/> PHIUS+ 2015 USGBC LEED: <input type="checkbox"/> Certified <input type="checkbox"/> Silver <input type="checkbox"/> Gold <input type="checkbox"/> Platinum Other: _____ Date Verified: ____/____/____ Green Certification Version: ____ Organization URL: _____	Energy Label Labels disclose the state the home's energy assets. RESNET's HERS Rating (0 to 150): ____ <input type="checkbox"/> Sampling Rating <input type="checkbox"/> Projected Rating <input type="checkbox"/> Confirmed Rating DOE's Home Energy Score (1 to 10): ____ <input type="checkbox"/> Official Score <input type="checkbox"/> Unofficial Score Other Energy Score: ____ Range (____ to ____): ____ Date Verified: ____/____/____ Score or Rating Version: ____ Organization URL: <input type="checkbox"/> www.resnet.us/ <input type="checkbox"/> www.homeenergyscore.gov <input type="checkbox"/> Other: _____
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Verified Energy Improvements
 Explain energy-related improvements:
 Cost of improvements: \$ ____
 Only include improvements with verified documentation.
 Date Verified: ____/____/____ Certificate of Efficiency Improvements Version: ____ Organization URL: ☐ energystar.gov/homeperformance ☐ Other: _____

Completed by: _____ Title: _____ Date: _____

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Third-Party Green Certifications

Elements of Green Building

Energy Labeling Details

Cost of Energy-Related Improvements

Appraisal Institute's Residential Green Addendum

Whether completed by the builder, designer, energy rater, or a combination of these professionals - the addendum should be completed by the people with the most knowledge of what designed and installed components are included in a particular project.

Each page includes a separate space for the detail provider to sign-on to the project details: most appraisers report they are not provided enough documentation, so having these details provided by the appropriate team member can more directly translate these energy saving and high performance features into increased property value.

Client:		Client File #:	
Subject Property:		Appraisal File #:	

EFFICIENCY FEATURES (Water, Energy, and Environmental. See types defined in glossary).
The following items are considered within the appraisal analysis of the subject property:

Insulation	<input type="checkbox"/> Fiberglass Blown-In <input type="checkbox"/> Foam Insulation <input type="checkbox"/> Cellulose <input type="checkbox"/> Fiberglass Batt Insulation <input type="checkbox"/> R-Value <input type="checkbox"/> Wall <input type="checkbox"/> Ceiling <input type="checkbox"/> Other (Describe): _____					
Building Envelope	Envelope Tightness: _____ Unit: <input type="checkbox"/> CFM25 <input type="checkbox"/> CFM50 <input type="checkbox"/> ACH50 <input type="checkbox"/> ACH natural Instructions: Insert the rating as a number that could be 0.5 to 7ACH50 or higher. The lower the number, the more air tight the envelope. Building Codes for area show maximum Envelope Tightness allowed based on the climate zone. Not all areas have adopted a building code. http://bcap-energy.org/					
Windows	<input type="checkbox"/> ENERGY STAR® <input type="checkbox"/> Low E <input type="checkbox"/> High Impact <input type="checkbox"/> Storm <input type="checkbox"/> Double Pane <input type="checkbox"/> Tinted <input type="checkbox"/> Solar Shades <input type="checkbox"/> Triple Pane					
Day Lighting	<input type="checkbox"/> # Of Skylights: _____ <input type="checkbox"/> # Of Solar Tubes: _____ <input type="checkbox"/> Other (Describe): _____ (% Of Lighting LEDs): _____					
ENERGY STAR® Appliances	ENERGY STAR®: <input type="checkbox"/> Dishwasher <input type="checkbox"/> Refrigerator <input type="checkbox"/> Washer/Dryer <input type="checkbox"/> Other: _____ Energy Source: <input type="checkbox"/> Propane <input type="checkbox"/> Electric <input type="checkbox"/> Natural Gas <input type="checkbox"/> Other: _____ Note: ENERGY STAR® appliances do not result in an ENERGY STAR® Home.					
Water Heater	<input type="checkbox"/> ENERGY STAR® Size: _____ gallons <input type="checkbox"/> Tankless <input type="checkbox"/> Solar (next page) <input type="checkbox"/> Heat Pump <input type="checkbox"/> Coil					
HVAC & Related Equipment Describe in comments area.	<table border="0"> <tr> <td> <input type="checkbox"/> High Efficiency HVAC SEER: _____ Efficiency Rating: _____% AFUE* _____% *Annual Fuel-Utilization Efficiency </td> <td> <input type="checkbox"/> Heat Pump Efficiency Rating: _____ COP: _____ HSPF: _____ SEER: _____ EER: _____ </td> <td> Thermostat/Controllers? <input type="checkbox"/> Yes <input type="checkbox"/> No Programmable Thermostat? <input type="checkbox"/> Yes <input type="checkbox"/> No Auxiliary heat source? <input type="checkbox"/> Yes <input type="checkbox"/> No Radiant Floor Heat? <input type="checkbox"/> Yes <input type="checkbox"/> No Geothermal? <input type="checkbox"/> Yes <input type="checkbox"/> No Electric Vehicle Ready? (car charger) <input type="checkbox"/> Yes <input type="checkbox"/> No </td> </tr> </table>			<input type="checkbox"/> High Efficiency HVAC SEER: _____ Efficiency Rating: _____% AFUE* _____% *Annual Fuel-Utilization Efficiency	<input type="checkbox"/> Heat Pump Efficiency Rating: _____ COP: _____ HSPF: _____ SEER: _____ EER: _____	Thermostat/Controllers? <input type="checkbox"/> Yes <input type="checkbox"/> No Programmable Thermostat? <input type="checkbox"/> Yes <input type="checkbox"/> No Auxiliary heat source? <input type="checkbox"/> Yes <input type="checkbox"/> No Radiant Floor Heat? <input type="checkbox"/> Yes <input type="checkbox"/> No Geothermal? <input type="checkbox"/> Yes <input type="checkbox"/> No Electric Vehicle Ready? (car charger) <input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> High Efficiency HVAC SEER: _____ Efficiency Rating: _____% AFUE* _____% *Annual Fuel-Utilization Efficiency	<input type="checkbox"/> Heat Pump Efficiency Rating: _____ COP: _____ HSPF: _____ SEER: _____ EER: _____	Thermostat/Controllers? <input type="checkbox"/> Yes <input type="checkbox"/> No Programmable Thermostat? <input type="checkbox"/> Yes <input type="checkbox"/> No Auxiliary heat source? <input type="checkbox"/> Yes <input type="checkbox"/> No Radiant Floor Heat? <input type="checkbox"/> Yes <input type="checkbox"/> No Geothermal? <input type="checkbox"/> Yes <input type="checkbox"/> No Electric Vehicle Ready? (car charger) <input type="checkbox"/> Yes <input type="checkbox"/> No				
Indoor Environmental Quality	<input type="checkbox"/> Energy (ERV) or Heat Recovery Ventilator (HRV) <input type="checkbox"/> Non Toxic Pest Control <input type="checkbox"/> Other Measured Whole-House Ventilation Device (See glossary) <input type="checkbox"/> Radon System: <input type="checkbox"/> Humidity Monitoring Device installed <input type="checkbox"/> Active <input type="checkbox"/> Passive					
Water Efficiency	<input type="checkbox"/> Reclaimed Water System (Describe): _____ <input type="checkbox"/> Rain Barrels Used in Irrigation <input type="checkbox"/> Greywater reuse system Cistern size: _____ gallons <input type="checkbox"/> Water Saving Fixtures Location of cistern: _____					
Utility Costs	Annual Utility Cost: \$ _____/year, based on: ____/____/____ to ____/____/____ (full year). Includes (check all that apply): <input type="checkbox"/> Electric <input type="checkbox"/> Heating <input type="checkbox"/> Water <input type="checkbox"/> Other: _____ # Of Occupants: _____					
Comments Include source for information provided in this section.	If a property is built green but not formally certified, it still deserves proper description and analysis to value the features. The market analysis is of the structure's physical, economic, and locational attributes and not an analysis of its label alone. Provide additional information that illustrates how this property exceeds local building code. This document is intended for new construction or existing homes that have been retrofitted to include higher energy or green features.					

Efficiency Features

Includes...

Insulation Values

Building Envelope

Window Details

Day Lighting Features

Appliance Ratings

Equipment Efficiency

Indoor Air Quality

Water Efficiency

Utility Costs

Detail Provider

The objective of this Addendum is to standardize the communication of the high performing features of residential properties. Identifying the features not found on the appraisal form provides a basis for comparable selection and analysis of the features. Builders, contractors, homeowners, and third party verifiers are encouraged to complete this Addendum and present to appraisers, agents, lenders, and homeowners. Complete the pages that apply to the property appraised and provide to appraiser prior to the completion of an appraisal. Provide the Addendum to the lender at the time of loan application to assist them in understanding the property type so an appraiser with sufficient knowledge of this property type will be engaged to provide an appraisal to meet secondary mortgage market guidelines.

Completed by: _____ Title: _____ Date: _____

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Appraisal Institute's Residential Green Addendum

Special features related to solar energy generation and thermal water heating are provided on page 3 to standardize the details being provided.

Accuracy in providing the details on the Green Addendum is important as some details, like solar PV systems may require additional detail sheets and can affect proper valuation.

Client:		Client File #:	
Subject Property:		Appraisal File #:	

Solar Panels			
The following items are considered within the appraisal analysis of the subject property:			
Solar Photovoltaic (Electric) System			
Type of Ownership	Array #	Array # (if applicable)	
<input type="checkbox"/> Leased <input type="checkbox"/> Owned <input type="checkbox"/> * Solar Loan with UCC Filing <input type="checkbox"/> Power Purchase Agreement (PPA) If solar loan has UCC Filing, it is considered personal property and should not be included in market value.		<input type="checkbox"/> Leased <input type="checkbox"/> Owned <input type="checkbox"/> Solar Loan <input type="checkbox"/> UCC Filing <input type="checkbox"/> Power Purchase Agreement (PPA)	
Panel Specifications	System Size: _____ kW (1kW = 1000 Watts) Year Installed: _____ Energy Production: _____ kWh Source of Energy Production Estimate: _____ Manufacturer: _____ Warranty on Panels: _____ years	System Size: _____ kW (1kW = 1000 Watts) Year Installed: _____ Energy Production: _____ kWh Source of Energy Production Estimate: _____ Manufacturer: _____ Warranty on Panels: _____ years	
Array Placement	<input type="checkbox"/> Fixed Mount <input type="checkbox"/> Tracking Mount Tilt / Slope: _____ *Azimuth: _____	Tilt / Slope: _____ Azimuth: _____	
Inverter Specifications	Number of Inverters per Array: _____ Year Installed: _____ Wattage: _____ watts Manufacturer: _____ Warranty Term: _____ years	Number of Inverters per Array: _____ Year Installed: _____ Wattage: _____ watts Manufacturer: _____ Warranty Term: _____ years	
Energy Storing Batteries	Battery Type: <input type="checkbox"/> Lithium-ion <input type="checkbox"/> Lithium-ion Polymer <input type="checkbox"/> Lead Acid <input type="checkbox"/> Lead Calcium <input type="checkbox"/> AGM <input type="checkbox"/> GEL Manufacturer: _____ Storage Capacity: _____ kWh Warranty Term: _____ years Year Installed: _____		
Name of Utility Company:		Charge / kWh from Utility	\$ _____ / kWh
Solar Thermal Water Heating System			
Type of System	Active: <input type="checkbox"/> Direct <input type="checkbox"/> Indirect Passive: <input type="checkbox"/> Integral collector <input type="checkbox"/> Thermo-syphon	Storage Tank Size	Gallons: _____
Collector Type	<input type="checkbox"/> Flat-Plat <input type="checkbox"/> Integral <input type="checkbox"/> Evacuated-Tube Solar	System Age	Year Installed: _____
Back-Up System	<input type="checkbox"/> Conventional Water Heater <input type="checkbox"/> Tankless On Demand <input type="checkbox"/> Tankless Heat Pump	Warranty Term	
Solar Energy Factor (SEF)	*Rating ranges 1 to 11. Higher number is more efficient.		
Proposed Solar Installation			
Roof Shape: <input type="checkbox"/> Pitched <input type="checkbox"/> Flat <input type="checkbox"/> Rounded <input type="checkbox"/> Multiple Rafters: <input type="checkbox"/> Typical <input type="checkbox"/> Engineered Wood Trim <input type="checkbox"/> Rough Sawn <input type="checkbox"/> Structured Insulated Panel Roof <input type="checkbox"/> Metal <input type="checkbox"/> TJI Rafters Decking: <input type="checkbox"/> No decking <input type="checkbox"/> Plywood <input type="checkbox"/> Tongue & Groove <input type="checkbox"/> OSB <input type="checkbox"/> Skip sheathing/Purlin <input type="checkbox"/> Structured Insulated Panel Slope/Roof Pitch: _____ (example: S1.6/12) Roof Material: <input type="checkbox"/> Comp Shingle <input type="checkbox"/> Rolled Asphalt <input type="checkbox"/> Concrete Tile <input type="checkbox"/> Clay Tile <input type="checkbox"/> Slate <input type="checkbox"/> Corrugated Metal <input type="checkbox"/> Standing Seam Metal <input type="checkbox"/> Polycarbonate/fiberglass <input type="checkbox"/> Foam <input type="checkbox"/> Tar and Gravel <input type="checkbox"/> Wood Shake Number of layers of roof material: _____ (Attach photograph of roof material and attic space) Electrical Service: <input type="checkbox"/> Overhead <input type="checkbox"/> Underground Main Electrical Panel: <input type="checkbox"/> Main Breaker Panel <input type="checkbox"/> MB & Sub Panel <input type="checkbox"/> Fuse Box Amperage: _____ Remaining spaces in main service panel (MSP), subpanel (if in garage), and utility meter (if located separate from MSP): _____ (Attach photograph of inside of electrical panel and door closed and a picture of three feet back to show space around the main service panel (and subpanel)) Red flag - <input type="checkbox"/> Gas line within 3' of electrical panel <input type="checkbox"/> More than 3 layers of roof covering <input type="checkbox"/> Wood Shake Shingles <input type="checkbox"/> Composition Shingle over Wood Shake <input type="checkbox"/> Tile Roof Without Decking <input type="checkbox"/> Composition Shingle less than 2:12 pitch <input type="checkbox"/> Roof section over 12:12 pitch <input type="checkbox"/> Unpermitted structure/addition <input type="checkbox"/> Metal Trusses <input type="checkbox"/> No permanent foundation <input type="checkbox"/> Carport may not be structurally sound <input type="checkbox"/> SIP Roofing may not be structurally sound <input type="checkbox"/> Open/No walls (Patio)			
Completed by: _____ Title: _____ Date: _____			

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Solar
Generation

Solar-Thermal
Water Heating

Proposed
Solar



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Group 14
ENGINEERING

BUILD Tank
INC.

Appraisal Institute's Residential Green Addendum

Site features such as walkability and transportation resources, as well as identified construction subsidies and incentives are included on page 3 and can confirm community investment and desirability in an appraisal.

For more details you can visit www.appraisalinstitute.org and search for Green Addendum - or check our Building Code Support Program web-portal for trainings related to these and more resources for promoting and 'selling' energy efficiency.

Client:		Client File #:	
Subject Property:		Appraisal File #:	

Location - Site			
The following items are considered within the appraisal analysis of the subject property:			
Walk Score	Score: _____	Source: <input type="checkbox"/> http://www.walkscore.com	<input type="checkbox"/> Other: _____
Public Transportation	<input type="checkbox"/> Bus Distance: _____ Blocks	<input type="checkbox"/> Train: Distance: _____ Blocks	<input type="checkbox"/> Subway Distance: _____ Blocks
Site	Orientation (front faces): <input type="checkbox"/> East / West <input type="checkbox"/> North / South	Landscaping: <input type="checkbox"/> Water Efficient <input type="checkbox"/> Natural <input type="checkbox"/> Pond/Lake on site <input type="checkbox"/> Rain Garden	
Comments			

Incentives – Amount of Incentive and Terms	
The following items are considered within the appraised value of the subject property and based on effective date of value .	
Federal	
State	
Local	
Comments	Incentives offset cost and should be reported and described in the cost approach section of the report. Clearly identify the incentives that offset the gross cost of construction to meet appraisal standards. Incentives are typically not a sales concession in sales comparison approach since they do not transfer with the property and are not paid by the seller. Incentives are typically for a specified period and only those available as of the date of value should be addressed in the appraisal process. Incentives may be available to offset repairs or deferred maintenance items as well. Incentives, rebates, and tax credits for most U.S. properties can be found at www.dsireusa.org

The objective of this Addendum is to standardize the communication of the high performing features of residential properties. Identifying the features not found on the appraisal form provides a basis for comparable selection and analysis of the features.

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- Attach this completed document to the MLS listing to provide sufficient detail on sales and listings to assist buyers, appraisers, and real estate agents in understanding the high performance features of the property.
- Complete the pages that apply to the property appraised and provide to appraiser prior to the completion of an appraisal.
- Provide the Addendum to the lender at the time of loan application to assist them in understanding the property type so an appraiser with sufficient knowledge of this property type will be engaged to provide an appraisal to meet secondary mortgage market guidelines.

Completed by: _____	Title: _____	Date: _____
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Site/Location
Details

Government
Incentives

Reviewer
Details



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