



California Film & Television Tax Credit Program

APPLICATION & INTERIM CHECKLIST

IMPORTANT: PLEASE CAREFULLY REVIEW GUIDELINES REGARDING THESE REQUIREMENTS

BEFORE PRODUCTION (Must be submitted no less than 30 days prior to principal photography)

- Application Form - CFC Form A (rev 9/1/2009) -hard copy
- Budget in an industry-standard budgeting program indicating only Qualified Expenditures
- One-line Shooting Schedule for Feature/MOW; or Production Calendar for TV Series
- hard copy & electronic
- Synopsis of the screenplay, teleplay or series - hard copy
- Screenplay- PDF electronic preferred; if not, 2 sided hard copy
- Financing Sources Report - CFC Form B (new 6/1/2009)- hard copy
- Supporting financial documentation (e.g. commitment letters, term sheets, bank statements)- hard copies
- Independent Film Declaration - CFC Form C (rev 9/1/2009) (if applicable) - hard copy
- Relocation Statement (if applicable)- hard copy

UPON APPROVAL

- Orientation Meeting for Accountant, Line Producer, UPM (min. of 2 representatives)
- Monthly Status Report - CFC Form I (rev 9/1/2009)
(After initial report, may email CFC if no change in project status)

DURING PRODUCTION and/or POST PRODUCTION (via E-Mail)

- Call sheet on Day One of Principal Photography
- Final Production Reports (on a weekly basis)
- Monthly Status Report - CFC Form I (rev 9/1/2009)
(After initial report, may email CFC if no change in project status)
- Fiscal Year End Expenditure Report - if applicable - CFC Form K (rev 9/1/2009)

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CHECKLIST OF DOCUMENTS FOR OBTAINING TAX CREDIT CERTIFICATE

IMPORTANT: PLEASE CAREFULLY REVIEW GUIDELINES REGARDING THESE REQUIREMENTS

- Request for Tax Certificate - CFC Form J (new 6/1/2009)
- Proof of copyright registration of the screenplay or teleplay OR proof of copyright registration of the motion picture, television series or television movie.
- Documentation evidencing completion of final elements
- Employment Diversity Report - CFC Form H (new 6/1/2009)
- Expenditure Summary Report - CFC Form F (rev 6/1/2009)
- Cast, Crew, and Vendor Lists - PDF
- Main and end title final "checker" - PDF
- Agreed Upon Procedures Report prepared by independent, licensed CPA
- Local Community Expenditure Report - (if filming occurs outside 30 mile zone) - optional
- New Television Series: Documentation verifying initial distribution on basic cable
- MOW: Documentation evidencing initial distribution on television, broadcast in one part
- Miniseries: Documentation evidencing initial distribution on television of 2 or more episodes and a total running time of at least 150 program minutes

Failure to provide the requested documentation may result in loss of the credit.