

**NASSAU COUNTY INDUSTRIAL  
DEVELOPMENT AGENCY**

**APPLICATION FOR FINANCIAL ASSISTANCE**

**APPLICATION OF:**

NORTH SHORE MILLBROOK LLC

**APPLICANT NAME**

Please respond to all questions in this Application for Financial Assistance (the "Application") by, as appropriate:

- filling in blanks;
- checking the applicable term(s);
- attaching additional text (with notation in Application such as "see Schedule H, Item# I", etc.); or
- writing "N.A.", signifying "not applicable".

All attachments responsive to questions found in this Application should be clearly labeled and attached as Schedule I to the Application. If an estimate is given, enter "EST" after the figure. One signed original and one photocopy of the Application (including all attachments) must be submitted.

The following amounts are payable to the Nassau County Industrial Development Agency (the "Agency") at the time this Application is submitted to the Agency: (i) a \$1,000 non-refundable application fee (the "Application Fee"); (ii) a \$3,500 expense deposit for the Agency's Transaction/Bond Counsel fees and expenses (the "Counsel Fee Deposit"), (iii) a \$2,500 expense deposit for the cost/benefit analysis with respect to the project contemplated by this Application (the "Cost/Benefit Deposit"), and (iv) a \$500 expense deposit for the real property tax valuation analysis, if applicable, with respect to the project contemplated by this Application (the "Valuation Deposit"). The Application Fee will not be credited against any other fees or expenses which are or become payable to the Agency in connection with this Application or the project contemplated herein (the "Project"). In the event that the subject transaction does not close for any reason, the Agency may use all or any part of the Counsel Fee Deposit, the Cost/Benefit Deposit and/or the Valuation Deposit to defray the cost of Transaction/Bond Counsel fees and expenses, the cost of obtaining a cost/benefit analysis and/or the cost of obtaining a real property tax valuation with respect to the Project. In the event that the subject transaction does close, the Counsel Fee Deposit, the Cost/Benefit Deposit and the Valuation Deposit shall be credited against the applicable expenses incurred by the Agency with respect to the Project.

Every signature page comprising part of this Application must be signed by the Applicant or this Application will not be considered complete or accepted for consideration by the Agency.

The Agency's acceptance of this Application for consideration does not constitute a commitment on the part of the Agency to undertake the proposed Project, to grant any financial assistance with respect to the proposed Project or to enter into any negotiations with respect to the proposed Project.

Information provided herein may be subject to disclosure under the New York Freedom of Information Law (New York Public Officers Law § 84 et seq.) ("FOIL"). If the Applicant believes that a portion of the material submitted with this Application is protected from disclosure under FOIL, the Applicant should mark the applicable section(s) or page(s) as "confidential" and state the applicable exception to disclosure under FOIL.

5/3/22



Date

PART I. APPLICANT

A. APPLICANT FOR FINANCIAL ASSISTANCE:

Name: NORTH SHORE MILLBROOK LLC

Address: 40 RANDALL AVENUE, FREEPORT, NY 11520

Fax: 516-223-8828

NY State Dept. of

Labor Reg #: N/A Federal Employer ID #: [REDACTED]

NAICS Code # [REDACTED]

Website: N/A

Name of CEO or

Authorized Representative Certifying Application: Robert Schlesinger

Title of Officer: Managing Member

Phone Number: [REDACTED]

E-Mail: [REDACTED]

B. BUSINESS TYPE (Check applicable status. Complete blanks as necessary):

Sole Proprietorship ☐ General Partnership ☐ Limited Partnership ☐

Limited Liability Company ☒ Privately Held Corporation ☐

Publicly Held Corporation ☐ Exchange listed on \_\_\_\_\_

Not-for-Profit Corporation ☐

Income taxed as: Subchapter S ☐ Subchapter C ☐  
501(c)(3) Corporation ☐ Partnership ☒

State and Year of Incorporation/Organization: New York 10/7/14

Qualified to do Business in New York: Yes ☒ No ☐ N/A ☐

C. APPLICANT COUNSEL:

Firm name: HARRAS BLOOM & ARCHER, LLP

Address: 445 Broad Hollow Road, Suite 127  
Melville, NY 11747-3602

Primary  
Contact: Paul J. Bloom. Esq.  
Phone: 631-3 93-6220  
Fax: 631-393-6229  
E-Mail: pbloom@hba-law.com

- D. Principal stockholders, members or pailners, if any (i.e., owners of 10% or more of equity/voting rights in Applicant):

Name	Percentage owned
<u>Gamertz LLC</u>	<u>46%</u>
<u>Jason Schlesinger</u>	<u>23%</u>
<u>Robert Schlesinger</u>	<u>23%</u>

- E. If any of the persons described in the response to the preceding Question, or a group of said persons, owns more than a 50% interest in the Applicant, list all other entities which are related to the Applicant by virtue of such persons having more than a 50% interest in such entities:

See attached Schedule A

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- F. Is the Applicant related to any other entity by reason of more than 50% common ownership? If YES, indicate name of related entity and relationship:

YES ☐

NO ☒

\_\_\_\_\_  
\_\_\_\_\_

- G. List parent corporation, sister corporations and subsidiaries, if any:

N/A

\_\_\_\_\_  
\_\_\_\_\_

- H. Has the Applicant (or any parent company, subsidiary, affiliate or related entity or person) been involved in, applied for or benefited by any prior industrial development financing in the municipality in which this Project is located, whether by the Agency or another issuer, or in a contiguous municipality? ("Municipality" herein means city, town or village, or, if the Project is not in an incorporated city or village, Nassau County.) If YES, describe:

YES ☐

NO ☒

\_\_\_\_\_  
\_\_\_\_\_

- I. Is the Applicant (or any parent company, subsidiary, affiliate or related entity or person) or any principal(s) of the Applicant or its related entities involved in any litigation or aware of any threatened litigation that would have a material adverse effect on the Applicant's financial condition or the financial condition of said principal(s)? If YES, attach details at Schedule I.

YES ☐

NO ☒

- J. Has the Applicant (or any parent company, subsidiary, affiliate or related entity or person) or any principal(s) of the Applicant or its related entities, or any other business or concern with which such entities, persons or principal(s) have been connected, ever been involved, as debtor, in bankruptcy, creditors rights or receivership proceedings or sought protection from creditors? If YES, attach details at Schedule I.

YES ☐

NO ☒

- K. Has the Applicant (or any parent company, subsidiary, affiliate or related entity or person) or any principal(s) of the Applicant or its related entities, ever been convicted of any felony or misdemeanor (other than minor traffic offenses), or have any such related persons or principal(s) held positions or ownership interests in any firm or corporation that has been convicted of a felony or misdemeanor (other than minor traffic offenses), or are any of the foregoing the subject of a pending criminal proceeding or investigation? If YES, attach details at Schedule I.

YES ☐

NO ☒

- L. Has the Applicant (or any parent company, subsidiary, affiliate or related entity or person) or any principal(s) of the Applicant or its related entities, or any other business or concern with which such entities, persons or principal(s) have been connected, been cited for (or is there a pending proceeding or investigation with respect to) a civil violation of federal, state or local laws or regulations with respect to labor practices, hazardous wastes, environmental pollution, taxation, or other operating practices? If YES, attach details at Schedule I.

YES ☐

NO ☒

- M. Is the Applicant (or any parent company, subsidiary, affiliate or related entity or person) or any principal(s) of the Applicant or its related entities, or any other business or concern with which such entities, persons or principal(s) have been connected, delinquent or have any of the foregoing persons or entities been delinquent on any New York State, federal or local tax obligations within the past five (5) years? If YES, attach details at Schedule I.

YES ☐

NO ☒

- N. Complete the following information for principals (including, in the case of corporations, officers and members of the board of directors and, in the case of limited liability company, members and managers) of the Applicant:

<u>Name</u>	<u>Title</u>	<u>Other Business Affiliations</u>
<u>Robert Schlesinger</u>	<u>Managing member</u>	<u>See Exhibit E Attached</u>
<u>Jason Schlesinger</u>	<u>Member</u>	<u>See Exhibit F Attached</u>

Do any of the foregoing principals hold elected or appointive positions with New York State, any political division of New York State or any other governmental agency? If YES, attach details at Schedule I.

YES ☐

NO ☒

Are any of the foregoing principals employed by any federal, state or local municipality or any agency, authority, department, board, or commission thereof or any other governmental or quasi-governmental organization?

YES ☐

NO ☒

O. Operation at existing location(s) (Complete separate Section O for each existing location):

1. (a) Location: 240-250 Middleneck Road, Great Neck, NY

(b) Number of Employees: Full-Time: 3 \* See Schedule I Part-Time:       

(c) Annual Payroll, excluding benefits: \$75,000.00

(d) Type of operation (e.g. manufacturing, wholesale, distribution, retail, etc.) and products or services: Multi-family residential

(e) Size of existing facility real property  
(i.e., acreage of land): 4.35 acres

(f) Buildings (number and square footage of each): 5 buildings  
Building A - 5,844.3 square feet    Building B - 5,582.6 square feet  
Building C - 15,239.4 square feet    Building D - 5,809.8 square feet  
Building E - 5,839.6 square feet

(g) Applicant's interest in the facility

FEE TITLE: ☒ LEASE: ☐ OTHER (describe below):       

2. Will the completion of the proposed Project result in the removal of a plant or facility of the Applicant, or of a proposed user, occupant or tenant of the Project, or a relocation of any employee of the Applicant, or any employee of a proposed user, occupant or tenant of the Project, from one area of the State of New York (but outside of Nassau County) to a location in Nassau County or in the abandonment of such a plant or facility located in an area of the State of New York outside of Nassau County? If YES, complete the attached Anti-Raiding Questionnaire (Schedule D).

YES ☐

NO ☒

3. Will the proposed Project result in the removal or abandonment of a plant or facility of the Applicant, or of a proposed user, occupant or tenant of the proposed

Project, or a relocation of any employee of the Applicant, or any employee of a proposed user, occupant or tenant of the proposed Project, located within Nassau County? If YES, identify the location of the plant or facility and provide explanation.

YES ☐

NO ☒

N/A

- P. Has the Applicant considered moving to another state or another location within New York State? If YES, explain circumstances.

YES ☐

NO ☒

- Q. Does any one supplier or customer account for over 50% of Applicant's annual purchases or sales, respectively? If YES, attach name and contact information for supplier and/or customer, as applicable:

YES ☐

NO ☒

- R. Does the Applicant (including any related entity or person) or any principal(s) of the Applicant or its related entities, or any other business or concern with which such entities, persons or principal(s) have been connected, have any contractual or other relationship with the Agency or the County of Nassau? If YES, attach details at Schedule I.

YES ☐

NO ☒

- S. Nature of Applicant's business (e.g., description of goods to be sold, products manufactured, assembled or processed, services rendered):

Multi-family residential housing

- T. ANY RELATED PARTY PROPOSED TO BE A USER OF THE PROJECT:

Name: N/A

Relationship to Applicant: \_\_\_\_\_

Provide the information requested in Questions A through S above with respect to each such party by attachment at Schedule I.

PART II. PROPOSED PROJECT

A. Types of Financial Assistance Requested:

- ☐ Tax-Exempt Bonds
- ☐ Taxable Bonds
- ☐ Refunding Bonds
- ☒ Sales/Use Tax Exemption
- ☒ Mortgage Recording Tax Exemption
- ☒ Real Property Tax Exemption
- ☐ Other (specify): \_\_\_\_\_

B. Type of Proposed Project (check all that apply and provide requested information):

- ☐ New Construction of a Facility  
Square footage: 159,512 square feet above grade apartment building + below grade parking and tunnels 70,865 square feet and underground garages totaling 273 spaces
- ☐ Addition to Existing Facility  
Square footage of existing facility: NA  
Square footage of addition: \_\_\_\_\_
- ☒ Renovation of Existing Facility  
Square footage of area renovated: Remaining building exteriors to be renovated.  
Square footage of existing facility: \_\_\_\_\_
- ☐ Acquisition of Land/Building  
Acreage/square footage of land: N/A  
Square footage of building: \_\_\_\_\_
- ☐ Acquisition of Furniture/Machinery/Equipment  
List principal items or categories:  
N/A  
\_\_\_\_\_  
\_\_\_\_\_
- ☐ Other (specify): \_\_\_\_\_

C. Briefly describe the purpose of the proposed Project, the reasons why the Project is necessary to the Applicant and why the Agency's financial assistance is necessary, and the effect the Project will have on the Applicant's business or operations:

See Schedule "I"

\_\_\_\_\_

\_\_\_\_\_

- D. Is there a likelihood that the proposed Project would not be undertaken by the Applicant but for the granting of the financial assistance by the Agency? (If yes, explain; if no, explain why the Agency should grant the financial assistance with respect to the proposed Project)

YES X

NO \_\_\_\_\_

The project would not be economically viable without the requested financial assistance

- E. If the Applicant is unable to arrange Agency financing or other Agency financial assistance for the Project, what will be the impact on the Applicant and Nassau County? Would the Applicant proceed with the Project without Agency financing or other Agency financial assistance? Describe.

See Schedule "I"

- F. Location of Project:

Street Address: 240-250 Middleneck Road

City/Village(s): Great Neck – Village of Great Neck

Town(s): Town of North Hempstead

School District(s): Great Neck

Tax Map Section: 2 Block: 354 Lot: 138

Census Tract Number: 3005.00

- G. Present use of the Project site: Multi-family residential

- H. (a) What are the current real estate taxes on the Project site? (If amount of current taxes is not available, provide assessed value for each):

General: \$106,000.00

School: \$189,000.00

Village: \$ 41,000.00

- (b) Are tax certiorari proceedings currently pending with respect to the Project real property? If YES, attach details at Schedule I including copies of pleadings, decisions, etc. *pending – See Schedule "I"*

YES X

NO    

- I. Describe proposed Project site ownership structure (*i.e.*, Applicant or other entity):

A limited liability company comprised of two family members and two other entities

- J. To what purpose will the building or buildings to be acquired, constructed or renovated be used by the Applicant? (Include description of goods to be sold, products to be manufactured, assembled or processed and services to be rendered.)

See Schedule "I"

- K. If any space in the Project is to be leased to or occupied by third parties (*i.e.*, parties not related to the Applicant), or is currently leased to or occupied by third parties who will remain as tenants, provide the names and contact information for each such tenant, indicate total square footage of the Project to be leased to each tenant, and describe proposed use by each tenant:

The Buildings to be demolished are vacant. The tenants of the proposed buildings are not yet identified

- L. Provide, to the extent available, the information requested, in Part I, Questions A, B, D and O, with respect to any party described in the preceding response.

N/A

- M. Does the proposed Project meet zoning/land use requirements at proposed location?

YES X

NO

1. Describe present zoning/land use: Residence E
2. Describe required zoning/land use, if different: N/A
3. If a change in zoning/land use is required, please provide details/status of any request for change of zoning/land use requirements:

SEE SCHEDULE "I"

- N. Does the Applicant, or any related entity or person, currently hold a lease or license on the Project site? If YES, please provide details and a copy of the lease/license.



YES \_\_\_\_

NO X

- O. Does the Applicant, or any related entity or person, currently hold fee title to (i.e. own) the Project site?

YES X

NO \_\_\_\_

If YES, indicate:

(a) Date of purchase: 1/22/15 - please note that the Premises has been owned by members of the Schlesinger family or entities which they control for the past 55 years

(b) Purchase price: \$14,000,000

(c) Balance of existing mortgage, if any: \$28,000,000  
0,000

(d) Name of mortgage holder: Reznik Paz Revo Trusts Ltd.

(e) Special conditions: N/A

If NO, indicate name of present owner of Project site: N/A

- P. Does the Applicant or any related person or entity have an option or a contract to purchase the Project site and/or any buildings on the Project site?

YES \_\_\_\_

NO X

If YES, attach copy of contract or option at Schedule I and indicate:

(a) Date signed: \_\_\_\_\_

(b) Purchase price: \$ \_\_\_\_\_

(c) Closing date: \_\_\_\_\_

Is there a relationship legally or by virtue of common control or ownership between the Applicant (and/or its principals) and the seller of the Project (and/or its principals)?  
If YES, describe:

YES \_\_\_\_

NO X

- Q. Will customers personally visit the Project site for either of the following economic activities? If YES with respect to either economic activity indicated below, complete the attached Retail Questionnaire (Schedule E).

Sales of Goods: YES \_\_\_\_ NO X Sales of Services: YES \_\_\_\_ NO X

- R. Describe the social and economic conditions in the community where the Project site is or will be located and the impact of the proposed Project on the community (including impact on infrastructure, transportation, fire and police and other government-provided services):

See Schedule "I"

- S. Identify the following Project parties (if applicable):

Architect: Newman Designs

Engineer: Cameron Engineering

Contractors: A. Pappajohn Co.

- T. Will the Project be designed and constructed to comply with Green Building Standards? (if YES, describe the LEED green building rating that will be achieved):

YES \_\_\_\_

NO X

- U. Is the proposed Project site located on a Brownfield? (if YES, provide description of contamination and proposed remediation)

YES \_\_\_\_

NO X

- V. Will the proposed Project produce a unique service or product or provide a service that is not otherwise available in the community in which the proposed Project site is located?

YES X

NO \_\_\_\_

The Village needs additional housing

- W. Is the proposed Project site currently subject to an IDA transaction (whether through the Agency or otherwise)? If yes, explain.

YES \_\_\_\_

NO X

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**PART III. CAPITAL COSTS OF THE PROJECT**

A. Provide an estimate of cost of all items listed below:

	<u>Item</u>	<u>Cost</u>
1.	Land and/or Building Acquisition	\$ <u>14,000,000</u>
2.	Building Demolition	\$ <u>425,000</u>
3.	Construction/Reconstruction/Renovation	\$ <u>59,250,000</u>
4.	Site Work	\$ <u>6,000,000</u>
5.	Infrastructure Work	\$ <u>750,000</u>
6.	Architectural/Engineering Fees	\$ <u>1,650,000</u>
7.	Applicant's Legal Fees	\$ <u>600,000</u>
8.	Financial Fees	\$ <u>450,000</u>
9.	Other Professional Fees	\$ <u>350,000</u>
10.	Furniture, Equipment & Machinery Acquisition (not included in 3. above)	\$ <u>200,000</u>
11.	Other Soft Costs (describe)	\$ <u>210,000</u>
12.	Other (describe) <i>Enviro. Remediation</i>	\$ <u>250,000</u>
	<i>Incentive Payment Fee</i>	\$ <u>890,000</u>
	Total	\$ <u>89,025,000</u>

B. Estimated Sources of Funds for Project Costs:

a.	Tax-Exempt IDA Bonds:	\$ _____
b.	Taxable IDA Bonds:	\$ _____
c.	Conventional Mortgage Loans:	\$ <u>63,000,000</u>
d.	SBA or other Governmental Financing:	\$ _____
	Identify: _____	
e.	Other Public Sources (e.g., grants, tax credits):	\$ _____
	Identify: _____	
f.	Other Loans:	\$ _____
g.	Equity Investment:	\$ <u>26,025,00.0</u>
	(excluding equity attributable to grants/tax credits)	

TOTAL \$ 89,025,000

What percentage of the total project costs are  
funded/financed from public sector sources: N/A %

- C. Have any of the above costs been paid or incurred (including contracts of sale or purchase orders) as of the date of this application? If YES, describe particulars on a separate sheet. *See Schedule "I"*

YES X NO     

- D. Are items of working capital, moving expenses, work in progress, or stock in trade included in the proposed uses of the bond proceeds (if applicable)? If YES, provide details:

YES      NO      NOT APPLICABLE X

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- E. Will any of the funds to be borrowed through the Agency's issuance of bonds, if applicable, be used to repay or refinance an existing mortgage, outstanding loan or an outstanding bond issue? If YES, provide details:

YES      NO X NOT APPLICABLE     

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- F. Has the Applicant made any arrangement for the marketing or the purchase of the bonds or the provision of other third party financing (if applicable)? If YES, indicate with whom (subject to Agency approval) and provide a copy of any term sheet or commitment letter issued with respect to such financing.

YES      NO      NOT APPLICABLE X

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G. Construction Cost Breakdown:

Total Cost of Construction: \$ 66,425,000 (sum of 2-5 and 10 in Question A above)

Cost for materials: \$ 33,175,000

% Sourced in County: 90 %

% Sourced in State: 100 % (incl. County)

Cost for labor: \$ 33,250,000

% Sourced in County: 90 %

% Sourced in State: 100 % (incl. County)

Cost for "other": \$ \_\_\_\_\_

% Sourced in County: \_\_\_\_\_ %

% Sourced in State: \_\_\_\_\_ % (incl. County)

The Applicant acknowledges that the transaction/bond documents may include a covenant by the Applicant to undertake and document the total amount of capital investment as set forth in this Application.

**PART IV. COST/BENEFIT ANALYSIS**

- A. If the Applicant presently operates in Nassau County, provide the current annual payroll. Estimate projected payroll at the Project site in First Year, Second Year and Third Year after completion of the Project:

	<u>Present</u>	<u>First Year</u>	<u>Second Year</u>	<u>Third Year</u>
Full-time:	\$ <u>75,944</u>	\$ <u>125,000</u>	\$ <u>200,000</u>	\$ <u>215,000</u> * See Schedule I
Part-time: <sup>1</sup>	_____	_____	_____	_____

List the average salaries or provide ranges of salaries for the following categories of jobs (on a full-time equivalency basis) projected to be retained/created in Nassau County as a result of the proposed Project:

<u>Category of Jobs to be Retained:</u>	<u>Average Salary or Range of Salary:</u>	<u>Average Fringe Benefits or Range of Fringe Benefits</u>
Management		
Professional		
Administrative		
Production		
Supervisor		

<sup>1</sup> NOTE: The Agency converts part-time jobs into FTE's for evaluation and reporting purposes by dividing the number of part-time jobs by two (2).

Laborer	25,000-30,000	7,500 * See Schedule I
Independent Contractor <sup>2</sup>		
Other		

<u>Category of Jobs to be Created:</u>	<u>Average Salary or Range of Salary:</u>	<u>Average Fringe Benefits or Range of Fringe Benefits</u>
Management	60,000	7,500 * See Schedule I
Professional		
Administrative	50,000	7,500 * See Schedule I
Production		
Supervisor		
Laborer		
Independent Contractor <sup>3</sup>		
Other		

The Agency may utilize the foregoing employment projections and the projections set forth in Schedule C, among other things, to determine the financial assistance that will be offered by the Agency to the Applicant. The Applicant acknowledges that the transaction/bond documents may include a covenant by the Applicant to retain the number of jobs, types of occupations and amount of payroll with respect to the Project set forth in this Application.

- B. (i) Will the Applicant transfer current employees from existing location(s)? If YES, describe, please describe the number of current employees to be transferred and the location from which such employees would be transferred:

YES \_\_\_\_

NO X

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- (ii) Describe the number of estimated full time equivalent construction jobs to be created as a result of undertaking the project, to the extent any:

<sup>2</sup> As used in this chart, this category includes employees of independent contractors.

<sup>3</sup> As used in this chart, this category includes employees of independent contractors.

- C What, if any, is the anticipated increase in the dollar amount of production, sales or services following completion of the Project?

\$ N/A

What percentage of the foregoing amount is subject to New York sales and use tax?

N A %

What percentage of the Applicant's total dollar amount of production, sales or services (including production, sales or services rendered following completion of the Project) are made to customers outside the economic development region (i.e., Nassau and Suffolk Counties)?

N A %

Describe any other municipal revenues that will result from the Project (excluding the above and any PILOT payments):

\$890,000 to be paid to the Village, representing impact fee, permit and plan review

- D. What is the estimated aggregate annual amount of goods and services to be purchased by the Applicant for each year after completion of the Project and what portion will be sourced from businesses located in the County and the State (including the County):

	<u>Amount</u>	<u>% Sourced in County</u>	<u>% Sourced in State</u>
Year 1	<u>\$60,000</u>	<u>95</u>	<u>100</u>
Year 2	<u>\$61,500</u>	<u>95</u>	<u>100</u>
Year 3	<u>\$63,037</u>	<u>95</u>	<u>100</u>

- E. Describe, if applicable, other benefits to the County anticipated as a result of the Project, including a projected annual estimate of additional sales tax revenue generated, directly and indirectly, as a result of undertaking the project:

N A

- F. Estimated Value of Requested Financial Assistance:

Estimated Value of Sales Tax Benefit: \$2,030,753.00  
(i.e., gross amount of cost of goods and services)

that are subject to state and local sales and use taxes multiplied by 8.625%)

Estimated Value of Mortgage Tax Benefit: \$472,500  
(i.e., principal amount of mortgage loans  
loans multiplied by [0.75%])

Estimated Property Tax Benefit:

Will the proposed Project utilize a property tax exemption benefit other than from the Agency: NO  
(if so, please describe)

Term of PILOT Requested: 25

Existing Property Taxes on Land and Building: \$336,000

Estimated Property Taxes on completed Project: \$T.B.D.  
(without Agency financial assistance)

NOTE: Upon receipt of this Application by the Agency, the Agency's staff will create a PILOT schedule and estimate the amount of PILOT Benefit/Cost utilizing anticipated tax rates and assessed valuation, and attach such information as Exhibit A hereto.

- G. Describe and estimate any other one-time municipal revenues (not including fees payable to the Agency) that the Project will create:

N/A

#### PART V. PROJECT SCHEDULE

- A. If applicable, has construction/reconstruction/renovation work on the Project begun? If YES, indicate the percentage of completion:

1. (a) Site clearance	YES <u>    </u>	NO <u>X</u>	<u>    </u> % complete
(b) Environmental Remediation	YES <u>    </u>	NO <u>X</u>	<u>    </u> % complete
(c) Foundation	YES <u>    </u>	NO <u>X</u>	<u>    </u> % complete
(d) Footings	YES <u>    </u>	NO <u>X</u>	<u>    </u> % complete



(e) Steel YES \_\_\_ NO X \_\_\_ % complete  
 (f) Masonry YES \_\_\_ NO X \_\_\_ % complete  
 (g) Interior YES \_\_\_ NO X \_\_\_ % complete  
 (h) Other (describe below): YES \_\_\_ NO \_\_\_ \_\_\_ % complete

2. If NO to all of the above categories, what is the proposed date of commencement of construction, reconstruction, renovation, installation or equipping of the Project?

July 2022

- B. Provide an estimate of time schedule to complete the Project and when the first use of the Project is expected to occur:

Phase One to be completed 18 months after start date

Phase Two to be completed 15 months later

#### **PART VI ENVIRONMENTAL IMPACT**

- A. What is the expected environmental impact of the Project? (Complete the attached Environmental Assessment Form (Schedule G)).

No material adverse impact

- B. Is an environmental impact statement required by Article 8 of the N.Y. Environmental Conservation Law (i.e., the New York State Environmental Quality Review Act)?

YES X

NO \_\_\_

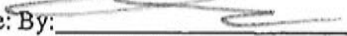
- C. Please be advised that the Agency may require at the sole cost and expense of the Applicant the preparation and delivery to the Agency of an environmental report in form and scope satisfactory to the Agency, depending on the responses set forth in the Environmental Assessment Form. If an environmental report has been or is being prepared in connection with the Project, please provide a copy.

- D. The Applicant authorizes the Agency to make inquiry of the United States Environmental Protection Agency, the New York State Department of Environmental Conservation or any other appropriate federal, state or local governmental agency or authority as to

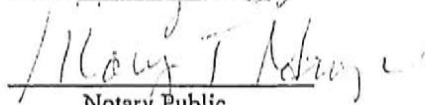
whether the Project site or any property adjacent to or within the immediate vicinity of the Project site is or has been identified as a site at which hazardous substances are being or have been used, stored, treated, generated, transported, processed, handled, produced, released or disposed of. The Applicant will be required to secure the written consent of the owner of the Project site to such inquiries (if the Applicant is not the owner), upon request of the Agency.

THE UNDERSIGNED HEREBY CERTIFIES, under penalties of perjury, that the answers and information provided above, and in any schedule, exhibit or statement attached hereto are true, accurate and complete, to the best of the knowledge of the undersigned.

Name of  
Applicant: North Shore Millbrook, LLC

Signature: By:   
Name: Robert Schlesinger  
Title: Managing Member  
Date: \_\_\_\_\_

Sworn to before me this 23  
day of May, 2022

  
Notary Public

MARY T GIORGI  
NOTARY PUBLIC  
STATE OF CONNECTICUT  
My Commission Expires Oct. 31, 2025

**CERTIFICATIONS AND ACKNOWLEDGMENTS  
OF THE APPLICANT**

**FIRST:**

The Applicant hereby certifies that, if financial assistance is provided by the Agency for the proposed project, no funds of the Agency (i) shall be used in connection with the Project for the purpose of preventing the establishment of an industrial or manufacturing plant or for the purpose of advertising or promotional materials which depict elected or appointed government officials in either print or electronic media, (ii) be given to any group or organization which is attempting to prevent the establishment of an industrial or manufacturing plant within the State.

**SECOND:**

The Applicant hereby certifies that no member, manager, principal, officer or director of the Applicant or any affiliate thereof has any blood, marital or business relationship with any member of the Agency (or any member of the family of any member of the Agency).

**THIRD:**

The Applicant hereby certifies that neither the Applicant nor any of its affiliates, nor any of their respective partners, members, shareholders or other equity owners (other than equity owners of publicly-traded companies), nor any of their respective employees, officers, directors, or representatives (i) is a person or entity with whom United States persons or entities are restricted from doing business under regulations of the Office of Foreign Asset Control (OFAC) of the Department of the Treasury, including those named on OFAC's Specially Designated and Blocked Persons List, or under any statute, executive order or other governmental action, or (ii) has engaged in any dealings or transactions or is otherwise associated with such persons or entities.

**FOURTH:**

The Applicant hereby acknowledges that the Agency shall obtain and hereby authorizes the Agency to obtain credit reports and other financial background information and perform other due diligence on the Applicant and/or any other entity or individual related thereto, as the Agency may deem necessary to provide the requested financial assistance.

**FIFTH:**

The Applicant hereby certifies that each owner, occupant or operator that would receive financial assistance with respect to the proposed Project is in substantial compliance with applicable federal, state and local tax, worker protection and environmental laws, rules and regulations.

**SIXTH:**

The Applicant hereby acknowledges that the submission to the Agency of any knowingly false or knowingly misleading information may lead to the immediate termination of any financial assistance and the recapture from the Applicant of an amount equal to all or any part of any tax exemption claimed by reason of the Agency's involvement in the Project.

**SEVENTH:**

The Applicant hereby certifies that, as of the date of this Application, the Applicant is in substantial compliance with all provisions of Article 18-A of the General Municipal Law, including, but not limited to, the provisions of Section 859-a and Section 862(1) thereof.

**EIGHTH:**

(i) Does the Project propose the creation of housing?

YES X NO     

If YES, how many units? 67 additional housing units

If YES, the Applicant hereby certifies that:

- (a) the Applicant has adopted a Fair Housing/Equal Housing Opportunity Policy substantially in the form of Exhibit B to this Application;
- (b) the proposed Project complies with applicable fair housing laws and that eligibility criteria for housing in any part of the Project will not include any residency requirements or preferences, including durational ones, age restrictions (unless for senior housing permitted by law), or other discriminatory criteria;
- (c) the Applicant (1) has posted its Fair Housing/Equal Housing Opportunity Policy publicly; and (2) will display fair housing law posters for consumers in its rental or sales office(s), in a form substantially similar to the model fair housing posters attached to this Application as Exhibit C (the Agency will provide applicants with fair housing law posters for display upon request by an applicant); and
- (d) key employees of the Applicant in charge of marketing and rental of the Project have completed (or will complete within one year of closing) four (4) hours of fair housing training provided by Long Island Housing Services ("LIHS") at a reasonably acceptable time and location and at no additional cost to the Applicant. In the event LIHS declines to provide or make available reasonably acceptable no-cost fair housing training, the provisions of this Certification VIII(i)(d) shall cease to be of any force and effect.

(ii) If YES to (i) above, does the Project propose the creation of "affordable" or "workforce" housing ("Affordable Housing")?

YES X NO     

If YES, the Applicant hereby certifies that the Applicant (1) has adopted a non-discriminatory affirmative marketing plan that meets the criteria set forth in Exhibit D to this Application; and (2) will submit such marketing plan to the Agency in writing prior to closing.

If YES, answer the following questions:

(a) What portion of the Project would consist of Affordable Housing (e.g., number of units)?

7 units - over 10% of the 67 additional units

(b) What are the eligibility requirements for the Affordable Housing?

As per Long Island Workforce Housing Act, individuals or families at 80 to 130 percent of median income for the Nassau-Suffolk primary statistical area.

(c) Cite the specific source of such eligibility requirements (e.g., federal, state or local law).

Voluntary establishment of affordable housing units will follow Long Island Workforce Housing requirements

Name of  
Applicant: North Shore Millbrook, LLC

By: 

Name: Robert Schlesinger  
Title: Managing Member

**CERTIFICATION AND AGREEMENT  
WITH RESPECT TO FEES AND COSTS**

Capitalized terms used but not otherwise defined in this Certification and Agreement shall have the meanings assigned to such terms in the Application.

The undersigned, being duly sworn, deposes and says, under penalties of perjury, as follows: that I am the chief executive officer or other representative authorized to bind the Applicant named in the attached application for financial assistance ("Application") and that I hold the office specified below my signature at the end of this Certification and Agreement, that I am authorized and empowered to deliver this Certification and Agreement and the Application for and on behalf of the Applicant, that I am familiar with the contents of said Application (including all schedules, exhibits and attachments thereto), and that said contents are true, accurate and complete to the best of my knowledge and belief.

The grounds of my belief relative to all matters in the Application that are not based upon my own personal knowledge are based upon investigations I have made or have caused to be made concerning the subject matter of this Application, as well as upon information acquired in the course of my duties and from the books and records of the Applicant.

As an authorized representative of the Applicant, I acknowledge and agree on behalf of the Applicant that the Applicant hereby releases the Nassau County Industrial Development Agency, its members, officers, servants, attorneys, agents and employees (collectively, the "Agency") from, agrees that the Agency shall not be liable for and agrees to indemnify, defend (with counsel selected by the Agency) and hold the Agency harmless from and against any and all liability, damages, causes of actions, losses, costs or expenses incurred by the Agency in connection with: (A) examination and processing of, and action pursuant to or upon, the Application, regardless of whether or not the Application or the financial assistance requested therein are favorably acted upon by the Agency, (B) the acquisition, construction, reconstruction, renovation, installation and/or equipping of the Project by the Agency, and (C) any further action taken by the Agency with respect to the Project; including, without limiting the generality of the foregoing, (i) all fees and expenses of the Agency's general counsel, transaction/bond counsel, economic development consultant, real property tax valuation consultant and other attorneys, experts and consultants (if deemed necessary or advisable by the Agency), and (ii) all other expenses (including attorneys' fees) incurred by the Agency in defending any suits, actions or proceedings that may arise as a result of any of the foregoing. If, for any reason whatsoever, 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 Applicant is unable to find buyers willing to purchase the total bond issue required or is unable to secure other third party financing or otherwise fails to conclude the Project, then upon presentation of an invoice by the Agency, its agents, attorneys or assigns, the Applicant shall pay to the Agency, its agents, attorneys or assigns, as the case may be, all fees and expenses reflected in any such invoice.

As an authorized representative of the Applicant, I acknowledge and agree on behalf of the Applicant that each of the Agency's general counsel, transaction/bond counsel, economic development consultant, real property tax valuation consultant and other experts and consultants is an intended third-party beneficiary of this Certification and Agreement, and that each of them may (but shall not be obligated to) enforce the provisions of the immediately preceding paragraph, whether by lawsuit or otherwise, to collect the fees and expenses of such party or person incurred by the Agency (whether or not first paid by the Agency) with respect to the Application.

Upon successful closing of the required bond issue or other form of financing or Agency assistance, the Applicant shall pay to the Agency an administrative fee set by the Agency (which amount is payable at closing) in accordance with the following schedule:

- (A) Taxable Bond Issues Six-tenths (6/10) of one percent (1%) for the first twenty million dollars (\$20,000,000) of total project costs and, if applicable, two-tenths (2/10) of one percent (1%) for any additional amounts in excess of twenty million dollars (\$20,000,000) of total project costs.
- (B) Tax-Exempt Bond Issues – Six-tenths (6/10) of one percent (1%) of total project costs.
- (C) Straight-Lease Transactions Six-tenths (6/10) of one percent (1%) for the first twenty million dollars (\$20,000,000) of total project costs and, if applicable, two-tenths (2/10) of one percent (1%) for any additional amounts in excess of twenty million dollars (\$20,000,000) of total project costs
- (D) General Counsel Fee – One-tenth (1/10) of one percent (1%) of total project costs, with a minimum fee of \$2,000.
- (E) All Initial Transactions - Two Thousand Five Hundred Dollars (\$2,500) closing compliance fee payable at closing and One Thousand Dollars (\$1,000) per year (or part thereof) administrative fee, payable in advance, at the closing for the first year (or part thereof) and on January 1st of each year for the term of the financing. The annual service fee is subject to periodic review and may be adjusted from time to time in the discretion of the Agency.
- (F) Refundings – The Agency fee shall be determined on a case-by-case basis.
- (F) Assumptions – The Agency fee shall be determined on a case-by-case basis.
- (G) Modifications – The Agency fee shall be determined on a case-by-case basis.

The Agency's transaction/bond counsel fees and expenses are payable at closing and are based on the work performed in connection with the Project.

The Agency's transaction/bond counsel's fees, general counsel fee and the administrative fees may be considered as a cost of the Project and included as part of any resultant financing, subject to compliance with applicable law.

Upon the termination of the financing of the Project, Applicant agrees to pay all costs in connection with any conveyance by the Agency to the Applicant of the Agency's interest in the Project and the termination of all related Project documents, including the fees and expenses of the Agency's general counsel, bond/transaction counsel, and all applicable recording, filing or other related fees, taxes and charges.

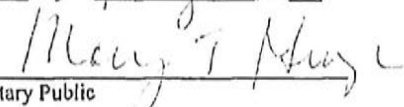
I further acknowledge and agree on behalf of the Applicant that, in the event the Agency shall have used all of its available tax-exempt bond financing allocation from the State of New York, if applicable, and shall accordingly be unable to obtain an additional allocation for the benefit of the Applicant, the Agency shall have no liability or responsibility as a result of the inability of the Agency to issue and deliver tax-exempt bonds for the benefit of the Applicant.

North Shore Millbrook, LLC

By: 

Name: Robert Schlesinger

Title: Managing Member

Subscribed and affirmed to me this 3  
day of May, 2025  
  
Notary Public

MARY T GIORGI  
NOTARY PUBLIC  
STATE OF CONNECTICUT  
My Commission Expires Oct. 31, 2025



TABLE OF SCHEDULES:

<u>Schedule</u>	<u>Title</u>	<u>Complete as Indicated Below</u>
A.	Tax-Exempt Bond Manufacturing Questionnaire	If Applicant checked "YES" in Part I, Question H of Application, if applicable
B.	New York State Financial and Employment Requirements for Industrial Development Agencies	All applicants
C.	Guidelines for Access to Employment Opportunities	All applicants
D.	Anti-Raiding Questionnaire	If Applicant checked "YES" in Part I, Question O.2. of Application
E.	Retail Questionnaire	If Applicant checked "YES" in Part II, Question Q of Application
F.	Applicant's Financial Attachments, consisting of:	All applicants
	1. Applicant's financial statements for the last two fiscal years (unless included in Applicant's annual reports).	
	2. Applicant's annual reports (or Form 10-K's) for the two most recent fiscal years.	
	3. Applicant's quarterly reports (Form 10-Q's) and current reports (Form 8-K's) since the most recent Annual Report, if any.	
	4. In addition, attach the financial information described above in items F1, F2, and F3 of any anticipated Guarantor of the proposed transaction, if different than the Applicant, including the personal financial statement of any anticipated Guarantor that is a natural person.	
G.	Environmental Assessment Form	All applicants
H.	Form NYS-45 (and 45-ATT)	All applicants
I.	Other Attachments	As required

**TAX-EXEMPT BOND MANUFACTURING QUESTIONNAIRE**

(To be completed by the Applicant if the Applicant checked "YES" in Part I, Question H of the Application for Financial Assistance, if applicable).

Please complete the following questions for each facility to be financed. Use additional pages as necessary.

1. Describe the production process which occurs at the facility to be financed.

---



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2. Allocate the facility to be financed by function (expressed in square footage) (e.g., production line, employee lunchroom, offices, restrooms, storage, warehouse, loading dock, repair shop, parking, research, sales, etc.) and location in relation to production (e.g., same building, adjacent land or building, off-site, etc.). Please attach blueprints of the facility to be financed.

<u>FUNCTION</u>	<u>LOCATION</u>	<u>SQ. FOOTAGE</u>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>

TOTAL

3. Of the space allocated to offices above, identify by function (e.g., executive offices, payroll, production, etc.) and location in relation to production (e.g., same building, adjacent land or building, off-site, etc.).

<u>FUNCTION</u>	<u>LOCATION</u>	<u>SQ. FOOTAGE</u>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>

TOTAL

4. Of the space allocated to storage or warehousing above, identify the square footage and location of the areas devoted to storage of the following:

SQ. FOOTAGE

LOCATION

Raw Materials used  
for production of  
manufactured goods

\_\_\_\_\_

Finished product storage

\_\_\_\_\_

Component parts of  
goods manufactured at  
the facility

\_\_\_\_\_

Purchased component  
parts

\_\_\_\_\_

Other (specify)

\_\_\_\_\_

TOTAL

\_\_\_\_\_

5. List raw materials used at the facility to be financed in the processing of the finished product(s).

\_\_\_\_\_  
\_\_\_\_\_

6. List finished product(s) which are produced at the facility to be financed.

\_\_\_\_\_  
\_\_\_\_\_

The UNDERSIGNED HEREBY CERTIFIES that the answers and information provided above, and in any statement attached hereto, are true and correct.

Name of  
Applicant:

\_\_\_\_\_

Signature:

\_\_\_\_\_

Name:

\_\_\_\_\_

Title:

\_\_\_\_\_

Date:

\_\_\_\_\_

**NEW YORK STATE FINANCIAL AND EMPLOYMENT REPORTING  
REQUIREMENTS FOR INDUSTRIAL DEVELOPMENT AGENCIES**

- A. Pursuant to applicable law, the Agency requires the completion of an Initial Employment Plan (see Schedule C) and a year-end employment plan status report, both of which shall be filed by the Nassau County Industrial Development Agency (the "Agency") with the New York State Department of Economic Development. The Project documents will require the Applicant to provide such report to the Agency on or before February 11 of the succeeding year, together with such employment verification information as the Agency may require.

Except as otherwise provided by collective bargaining agreements, the Applicant agrees to list any new employment opportunities with the New York Department of Labor Community Services Division and the administrative entity of the service delivery area created by the Federal Job Training Partnership Act (P.L. 97-300), or any successor statute thereto (the "JTPA Entities"). In addition, except as otherwise provided by collective bargaining agreements, the Applicant, where practicable, will first consider persons eligible to participate in JTPA programs who shall be referred by the JTPA Entities for such new employment opportunities.

- B. The Applicant will be required to file annually a statement with the New York State Department of Taxation and Finance and the Agency of the value of all sales or use tax exemptions claimed in connection with the Project by reason of the involvement of the Agency.
- C. The following information must be provided for all bonds issued, outstanding or retired during the year:


Name, address and owner of the project; total amount of tax exemptions granted (broken out by state and local sales tax, property taxes, and mortgage recording tax); payments in lieu of taxes made; total real estate taxes on the Project prior to exemption; number of jobs created and retained, and other economic benefits realized.

Date of issue; interest rate at end of year; bonds outstanding at beginning of year; bonds issued during year; principal payments made during year; bonds outstanding at end of year; federal tax status; and maturity date(s).

Failure to provide any of the aforesaid information will be constitute a **DEFAULT** under the Project documents to be entered into by the Agency and the Applicant in connection with the proposed Project.

Please sign below to indicate that the Applicant has read and understood the above and agrees to provide the described information on a timely basis.

Name of  
Applicant: North Shore Millbrook, LLC

Signature: By:   
Name: Robert Schlesinger  
Title: Managing Member  
Date: \_\_\_\_\_

GUIDELINES FOR ACCESS TO EMPLOYMENT OPPORTUNITIESINITIAL EMPLOYMENT PLAN

Prior to the expenditure of bond proceeds or the granting of other financial assistance, the Applicant shall complete the following initial employment plan:

Applicant Name: North Shore Millbrook, LLC  
 Address: 40 Randall Avenue, Freeport, NY 11520  
 Type of Business: Residential Apartment Complex  
 Contact Person: Robert Schlesinger Tel. No. [REDACTED]

Please complete the following table describing the projected full-time equivalent employment plan for the proposed Project following receipt of financial assistance:

<u>Current and Planned Occupations</u>	<u>Present Jobs Per Occupation</u>	<u>Estimated Number of Full Time Equivalent Jobs After Completion of the Project:<sup>4</sup></u>			<u>Estimate of Number of Residents of the LMA<sup>5</sup> that would fill such jobs by the third year</u>
		<u>1 year</u>	<u>2 years</u>	<u>3 years</u>	
<u>Management</u>	<u>1</u>	<u>1</u>	<u>1</u>	<u>1</u>	<u>1</u>
<u>Professional</u>	<u>          </u>	<u>          </u>	<u>          </u>	<u>          </u>	<u>          </u>
<u>Administrative</u>	<u>1</u>	<u>1</u>	<u>1</u>	<u>1</u>	<u>1</u>
<u>Production</u>	<u>          </u>	<u>          </u>	<u>          </u>	<u>          </u>	<u>          </u>
<u>Supervisor</u>	<u>          </u>	<u>          </u>	<u>          </u>	<u>          </u>	<u>          </u>
<u>Laborer</u>	<u>3</u>	<u>3</u>	<u>3</u>	<u>3</u>	<u>3</u>
<u>Independent Contractor</u>	<u>          </u>	<u>          </u>	<u>          </u>	<u>          </u>	<u>          </u>
<u>Other (describe)</u>	<u>          </u>	<u>          </u>	<u>          </u>	<u>          </u>	<u>          </u>

<sup>4</sup> NOTE: Convert part-time jobs into FTE's for evaluation and reporting purposes by dividing the number of part-time jobs by two (2).

<sup>5</sup> The "LMA" means the Local Market Area, which is defined by the Agency as Nassau and Suffolk Counties. The Labor Market Area is the same as the Long Island Economic Development Region, as established pursuant to Section 230 of the New York State Economic Development Law.

Please indicate the number of temporary construction jobs anticipated to be created in connection with the acquisition, construction and/or renovation of the Project: 150

Please indicate the estimated hiring dates for the new jobs shown above and any special recruitment or training that will be required:

First person hired 19 months after construction

Second hire will be made 21 months after construction starts

Are the Applicant's employees currently covered by a collective bargaining agreement?

YES \_\_\_\_\_

NO X

IF YES, Union Name and Local: \_\_\_\_\_

Please note that the Agency may utilize the foregoing employment projections, among other things, to determine the financial assistance that will be offered by the Agency to the Applicant. The Applicant acknowledges that the transaction/bond documents may include a covenant by the Applicant to retain the above number of jobs, types of occupations and amount of payroll with respect to the proposed project.

Attached hereto as Schedule H is a true, correct and complete copy of the Applicant's most recent Quarterly Combined Withholding, Wage Reporting, and Unemployment Insurance Return (Form NYS-45 and 45-ATT). Upon request of the Agency, the Applicant shall provide such other or additional information or documentation as the Agency may require with respect to the Applicant's current employment levels in the State of New York.

The UNDERSIGNED HEREBY CERTIFIES that the answers and information provided above, and in any statement attached hereto, are true, correct and complete.

Name of Applicant: North Shore Millbrook LLC  
Signature: By: [Signature]  
Name: Robert Schlesinger  
Title: Managing Member  
Date:

**ANTI-RAIDING QUESTIONNAIRE**

(To be completed by Applicant if Applicant checked "YES" in Part I, Question O of the Application for Financial Assistance)

- A. Will the completion of the Project result in the removal of a plant or facility of the Applicant, or of a proposed user, occupant or tenant of the Project, or a relocation of any employee of the Applicant or of a proposed user, occupant or tenant of the Project, from an area in New York State (but outside of Nassau County) to an area within Nassau County?

YES \_\_\_\_

NO \_\_\_\_

If the answer to Question A is YES, please provide the following information:

Address of the to-be-removed plant or facility or the plants or facilities from which employees are relocated: \_\_\_\_

\_\_\_\_\_

Names of all current users, occupants or tenants of the to-be-removed plant or facility: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

- B. Will the completion of the Project result in the abandonment of one or more plants or facilities of the Applicant, or of a proposed user, occupant or tenant of the Project, located in an area of the State of New York other than in Nassau County?

YES \_\_\_\_

NO \_\_\_\_

If the answer to Question B is YES, please provide the following information:

Addresses of the to-be-abandoned plants or facilities: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Names of all current occupants of the to-be-abandoned plants or facilities:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



- C. Has the Applicant contacted the local industrial development agency at which its current plants or facilities in New York State are located with respect to the Applicant's intention to move or abandon such plants or facilities?

YES \_\_\_\_\_

NO \_\_\_\_\_

If the answer to Question C is YES, please provide details in a separate attachment.

IF THE ANSWER TO EITHER QUESTION A OR B IS "YES", ANSWER QUESTIONS D AND E.

- D. Is the Project reasonably necessary to preserve the competitive position of the Applicant, or of a proposed user, occupant or tenant of the Project, in its industry?

YES \_\_\_\_\_

NO \_\_\_\_\_

- E. Is the Project reasonably necessary to discourage the Applicant, or a proposed user, occupant or tenant of the Project, from removing such plant or facility to a location outside of the State of New York?

YES \_\_\_\_\_

NO \_\_\_\_\_

IF THE ANSWER TO EITHER QUESTION D OR E IS "YES", PLEASE PROVIDE DETAILS IN A SEPARATE ATTACHMENT.

Accordingly, the Applicant certifies that the provisions of Section 862(1) of the General Municipal Law will not be violated if financial assistance is provided by the Agency for the proposed Project.

NOTE: If the proposed Project involves the removal or abandonment of a plant or facility of the Applicant, or a proposed user, occupant or tenant of the Project, within the State of New York, notification will be made by the Agency to the chief executive officer(s) of the municipality or municipalities in which such plant or facility was located.

THE UNDERSIGNED HEREBY CERTIFIES that the answers and information provided above and in any statement attached hereto are true, correct and complete.

Name of  
Applicant:

\_\_\_\_\_

Signature:

\_\_\_\_\_

Name:

\_\_\_\_\_

Title:

\_\_\_\_\_

Date:

\_\_\_\_\_

RETAIL QUESTIONNAIRE

(To be completed by Applicant if Applicant checked either "YES" in Part II, Question Q of the Application for Financial Assistance)

- A. Will any portion of the Project (including that portion of the cost to be financed from equity or sources other than Agency financing) consist of facilities or property that are or will be primarily used in making retail sales to customers who personally visit the Project?

YES \_\_\_\_

NO \_\_\_\_

For purposes of Question A, the term "retail sales" means (i) sales by a registered vendor under Article 28 of Tax Law of the State of New York (the "Tax Law") primarily engaged in the retail sale of tangible personal property (as defined in Section 1101(b)(4)(i) of the Tax Law), or (ii) sales of a service to customers who personally visit the Project.

- B. If the answer to Question A is YES, what percentage of the cost of the Project (including that portion of the cost to be financed from equity or sources other than Agency financing) will be expended on such facilities or property primarily used in making retail sales of goods or services to customers who personally visit the Project?

\_\_\_\_\_%

- C. If the answer to Question A is YES, and the amount entered for Question B is greater than 33.33%, indicate whether any of the following apply to the Project:

1. Is the Project likely to attract a significant number of visitors from outside the economic development region (i.e., Nassau and Suffolk Counties) in which the Project is or will be located?

YES \_\_\_\_

NO \_\_\_\_

2. Is the predominant purpose of the Project to make available goods or services which would not, but for the Project, be reasonably accessible to the residents of the city, town or village within which the Project will be located, because of a lack of reasonably accessible retail trade facilities offering such goods or services?

YES \_\_\_\_

NO \_\_\_\_

3. Will the Project be located in one of the following: (a) an area designated as an empire zone pursuant to Article 18-B of the General Municipal Law; or (b) a census tract or block numbering area (or census tract or block numbering area contiguous thereto) which, according to the most recent census data, has (i) a poverty rate of at least 20% for the year in which the data relates, or at least 20% of the households receiving public assistance, and (ii) an unemployment rate of at least 1.25 times the statewide unemployment rate for the year to which the data relates?

YES \_\_\_\_

NO \_\_\_\_

If the answer to any of the subdivisions 1 through 3 of Question C is YES, attach details.

- D. If the answer to any of the subdivisions 2 through 3 of Question C is YES, will the Project preserve permanent, private sector jobs or increase the overall number of permanent, private sector jobs in the State of New York? If YES, attach details.

YES \_\_\_\_

NO \_\_\_\_

- E. State percentage of the Applicant's annual gross revenues comprised of each of the following:

Retail Sales: \_\_\_\_%

Services: \_\_\_\_%

- F. State percentage of Project premises utilized for same:

Retail Sales: \_\_\_\_%

Services: \_\_\_\_%

The UNDERSIGNED HEREBY CERTIFIES that the answers and information provided above and in any statement attached hereto are true, correct and complete.

Name of  
Applicant:

\_\_\_\_\_

Signature:

\_\_\_\_\_

Name:

\_\_\_\_\_

Title:

\_\_\_\_\_

Date:

\_\_\_\_\_

APPLICANT'S FINANCIAL ATTACHMENTS

**Operating Statement (Fuel Consumption)**

	2017	2016	2015
<b>Income</b>			
Residential Rental	\$1,317,103	\$1,310,701	\$1,590,567
Non-Residential Rental	\$0	\$0	\$0
Miscellaneous (other than rent)	\$2,397	\$7,712	\$12,800
Real Estate Tax Refunds	\$0	\$0	\$0
<b>Total Income</b>	<b>\$1,319,490</b>	<b>\$1,318,413</b>	<b>\$1,603,367</b>
<b>Expenses</b>			
Hauling Fuel	\$68,451	\$69,415	\$62,167
Utilities including Sewer and Water Charges	\$37,875	\$39,016	\$45,548
Payroll and Related Costs	\$111,907	\$152,360	\$127,652
Real Estate Taxes	\$359,281	\$374,848	\$351,834
Insurance	\$42,180	\$48,548	\$38,484
Management	\$87,602	\$97,988	\$110,350
Repairs and Maintenance	\$324,805	\$404,519	\$448,082
Interest	\$448,742	\$350,151	\$338,111
Miscellaneous	\$2,030	\$1,023	\$1,000
Depreciation	\$487,548	\$475,921	\$472,003
<b>Total Expenses</b>	<b>\$1,948,531</b>	<b>\$2,073,544</b>	<b>\$2,202,061</b>
<b>Net Gain or Loss</b>	<b>\$-629,041</b>	<b>\$-755,131</b>	<b>\$-598,694</b>
<b>Fuel Consumption Per Year</b>			
Oil Grade #2 in gallons	0	0	0
Oil Grade #4 in gallons	0	0	0
Oil Grade #0 in gallons	0	0	0
Gas - Interruptible Service in cubic feet	0	0	0
Gas - Non-Interruptible Service in cubic feet	8,595,000	8,720,500	8,893,000

If any of the income items entered above changes by more than 50% from year to year, please provide a brief description: FOR 2017 AND 2018 THERE WAS A DECLINE IN MISCELLANEOUS INCOME.

If any of the expense items entered above changes by more than 50% from year to year, please provide a brief description: ADDITIONAL MISCELLANEOUS EXPENSES FOR 2017.

**Mortgage Information**

**First Mortgage:**

Mortgage Holder Name: [REDACTED]  
Mortgage Holder Address: [REDACTED]  
Is This an HFA Mortgage: No  
Initial Mortgage Amount: \$13,788,000  
Mortgage Balance: \$12,888,704  
Yearly 2017 Amortization Payments: \$288,715  
Yearly 2016 Amortization Payments: \$312,418  
Yearly 2015 Amortization Payments: \$254,163  
2017 Interest Rate: 3.500%  
2016 Interest Rate: 2.625%  
2015 Interest Rate: 2.025%  
Mortgage Terms From: 01/2015  
To: 02/2023

**Second Mortgage:**

Mortgage Holder Name:  
Mortgage Holder Address:  
Is This an HFA Mortgage:  
Initial Mortgage Amount:  
Mortgage Balance:  
Yearly 2017 Amortization Payments:  
Yearly 2016 Amortization Payments:  
Yearly 2015 Amortization Payments:  
2017 Interest Rate:  
2016 Interest Rate:  
2015 Interest Rate:  
Mortgage Terms From:  
To:

If mortgage was refinanced during the last 2 years, state the following:

Previous Interest Rate:  
Previous Amortization Payment:  
Current Interest Rate:  
Current Amortization Payment:

**Major Capital Improvement(s):**

**Rent Schedule:**

Building Registration Number	Apartment Number	Number of Rooms	Legal Regulated Rent per Month on 12/31/2017	Apartment Status
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ENVIRONMENTAL ASSESSMENT FORM

FORM NYS-45

Attach most recent quarterly filing of Form NYS-45 and 45-ATT, as well as the most recent fourth quarter filing. Please remove the employee social security numbers and note which employees are part-time.

22222		Employee's social security number [REDACTED]		OMB No. [REDACTED]	
b Employer identification number (EIN) [REDACTED]		1 Wages, tips, other compensation 27450.00		2 Federal income tax withheld 3275.10	
c Employer's name, address, and ZIP code Dynamic Property Solutions II Inc 40 Randall Ave Freeport, NY 11520		3 Social security wages 27450.00		4 Social security tax withheld 1701.90	
		5 Medicare wages and tips 27450.00		6 Medicare tax withheld 398.04	
		7 Social security tips		8 Allocated tips	
d Control number [REDACTED]		9		10 Dependent care benefits	
e Employee's first name and initial [REDACTED] Last name [REDACTED] Suff. [REDACTED]		11 Nonqualified plans		12a	
		13 Statutory employee Retirement plan Third-party sick pay		12b	
		14 Other [REDACTED]		12c	
				12d	
f Employee's address and ZIP code		15 State wages, tips, etc. 27450.00		17 State income tax 754.02	
15 State Employee's state ID number NY [REDACTED]		16 State wages, tips, etc. 27450.00		17 State income tax 754.02	
		18 Local wages, tips, etc.		19 Local income tax	
				20 Locality name	

Form **W-2** Wage and Tax Statement  
Copy 1 - For State, City, or Local Tax Department

2017

Department of the Treasury - Internal Revenue Service

22222		Employee's social security number [REDACTED]		OMB No. [REDACTED]	
b Employer identification number (EIN) [REDACTED]		1 Wages, tips, other compensation 5300.00		2 Federal income tax withheld 639.00	
c Employer's name, address, and ZIP code Dynamic Property Solutions II Inc 40 Randall Ave Freeport, NY 11520		3 Social security wages 5300.00		4 Social security tax withheld 328.60	
		5 Medicare wages and tips 5300.00		6 Medicare tax withheld 76.86	
		7 Social security tips		8 Allocated tips	
d Control number [REDACTED]		9		10 Dependent care benefits	
e Employee's first name and initial [REDACTED] Last name [REDACTED] Suff. [REDACTED]		11 Nonqualified plans		12a	
		13 Statutory employee Retirement plan Third-party sick pay		12b	
		14 Other [REDACTED]		12c	
				12d	
f Employee's address and ZIP code		15 State wages, tips, etc. 5300.00		17 State income tax 187.36	
15 State Employee's state ID number NY [REDACTED]		16 State wages, tips, etc. 5300.00		17 State income tax 187.36	
		18 Local wages, tips, etc.		19 Local income tax	
				20 Locality name	

Form **W-2** Wage and Tax Statement  
Copy 1 - For State, City, or Local Tax Department

2017

Department of the Treasury - Internal Revenue Service





OTHER ATTACHMENTS

## Schedule I

### Part II

#### Pg. 7 (o) (1) (b)

Persons employed at the complex are not employed directly by the Applicant, but are leased through Dynamic Property Solutions II, Inc. Copies the W-2's for these employees are annexed at Schedule H. The additional 2 workers who will be required on site upon completion of the Project will also be leased by the applicant through Dynamic Property Solutions II.

### Part II

#### Pg. 10 (c)

The proposed project site currently is a residential apartment development with 119 units on 4.35 acres located at 238-250 Middleneck Road in the Village of Great Neck, New York. The Project will consist of the demolition of 35 apartments located in multiple buildings throughout the site and the construction of three separate new buildings totaling 101 new apartment homes, a net increase of 67 apartments. Two of the buildings will be 4 stories and the third will be 1 story. The remaining existing two story buildings will have a new third story. The unit mix of the completed complex will be; 94-1brs, 68-2brs, 24-3brs- 186 total. 7 apartments, representing 10% of the 67 additional units, will be work force housing. The mix of workforce housing will be 3-1brs, 3-2brs, 1-3br which will provide affordable housing for individuals and families at 80-130% of the median income for Nassau-Suffolk primary metropolitan statistical area as defined by the Federal Department of Housing and Urban Development. One of the units will be set aside for the property superintendent. The Project will provide the Village of Great Neck with necessary rental housing and workforce housing, to promote the economic growth in the area. The Project is located in a transportation orientated area with public transportation at the Projects front door and is approximately .7 miles away from the LIRR train station. The bedroom count has changed as a result of the modified Approved Plans. Initially the bedroom count was 89-1 bedroom, 81-2 bedrooms and 16-3 bedrooms. The current proposal increases the number of 1 bedroom to 94, reducing the two bedrooms by 13 to 68 and increasing the 3 bedrooms by 8 to 24.

### Part II

#### Pg. 11 (e)

If the Applicant is unable to obtain financial assistance from the IDA, the Project becomes cost prohibitive and the Applicant will be forced to abort the Project. The savings from the IDA assistance, including real estate tax, mortgage recording tax and sales tax, make the Project viable. There is a need for more transportation oriented residential rental options in Nassau County, specifically in the Village of Great Neck. If the Applicant is unable to proceed with the project, Nassau County loses the benefit of additional rental units, work force housing units, and approximately two additional full time jobs within the county.

### Part II

#### Pg. 12 (j)

The current conditions are 1950's constructed 119 units, 35 of which are to be demolished. In their place and on open land/parking lots will be 101 new units constructed in 3 new buildings, plus a combination of 272 underground and surface parking spaces, drastically improving todays parking ratio.

### Part II

#### Pg.12 (m) (3)

Through the Village of Great Neck Incentive Zone, the following conditions of relief have been obtained:

1. Relief to permit four stories in lieu of three stories height limit for buildings in the Residence E Zone within a 45' height limit.
2. Relief from today's parking code applied to the 1950 era built housing of 75 parking spaces.

#### Part II

Pg. 14 (r)

The subject property is located within a very desirable housing market on Long Island with easy access to mass transit. The Project will provide needed additional rental options, including the work force housing, 5 full time jobs and a needed improvement to the Middleneck Road corridor. The Project will also provide rental housing options that should encourage additional residency which will promote economic growth.

#### Part III

Pg. 16 (c)

In preparation of moving the project forward, the applicant has currently spent approximately \$3,560,000.00.

#### Part IV

Pg. 17-18

Top 2 boxes. Persons employed at the complex are not employed directly by the Applicant, but are leased through Dynamic Property Solutions II, Inc.

3<sup>rd</sup> Box. The additional 2 workers who will be required on site upon completion of the Project will also be leased by the applicant through Dynamic Property Solutions II.

**EXHIBIT A**

Upon acceptance of the Application by the Agency for processing and completion of the Cost/Benefit Analysis, the Agency will attach a proposed PILOT Schedule hereto, together with an estimate of the net tax benefit/cost of the proposed PILOT Schedule.

## EXHIBIT B

### **Fair Housing/Equal Housing Opportunity Policy to be adopted by Agency Applicants for Housing Projects**

As part of our continuing effort to ensure compliance with federal, state, and local anti-discrimination laws, we would like to take this opportunity to remind you of our policies regarding equal housing opportunity. It is important for all employees to review his or her own actions in light of these requirements and for everyone to keep in mind the importance of treating all persons equally.

It is the policy and practice of this company not to engage in or assist the efforts of others to engage in housing discrimination. Consistent with that policy, we remind you that the antidiscrimination laws of the United States, New York State, and local laws are quite specific in the area of housing, and in conformance with those laws, you must not engage in any of the following conduct during the course of your work for this company:

1. Refuse to show, rent, sell, negotiate for the rental or sale of, or otherwise make unavailable or deny, housing to any person because of race, color, religion, creed, sex/gender, familial status (having or expecting a child under 18), national origin, ethnicity, disability, marital status, age, sexual orientation, military status, source of income or status as survivor of domestic violence (each a "prohibited basis");
2. Discriminate against any person in the terms, conditions or privileges of a rental or sale or in the provision of services or facilities in connection therewith because of a prohibited basis;
3. Make any verbal or written statement with respect to the rental or sale of housing that indicates any preference, limitation or discrimination concerning a prohibited basis, or any statement indicating an intention to make any such preference, limitation or discrimination;
4. Represent to any person because of a prohibited basis that any housing or unit is not available for inspection, rental or sale when such apartment is in fact so available;
5. Steer persons into or away from certain areas of a building, development or neighborhood because of a prohibited basis;
6. Refuse to provide a reasonable accommodation in rules, policies, practices or services for tenants, buyers, or applicants with disabilities; and
7. Refuse to allow a reasonable modification to individual units or common areas for tenants, buyers, or applicants with disabilities.

We are firmly committed to the goal of fair housing. You should understand that any violation of this Fair Housing/Equal Housing Opportunity Policy will lead to discipline, up to and including discharge.

## EXHIBIT C

### Sample Fair Housing Posters

U. S. Department of Housing and Urban Development



EQUAL HOUSING  
OPPORTUNITY

We Do Business in Accordance With the Federal Fair  
Housing Law

(The Fair Housing Amendments Act of 1988)

**It is illegal to Discriminate Against Any Person  
Because of Race, Color, Religion, Sex,  
Handicap, Familial Status, or National Origin**

- |  |  |
|--|--|
| <input checked="" type="checkbox"/> In the sale or rental of housing or residential lots | <input checked="" type="checkbox"/> In the provision of real estate brokerage services |
| <input checked="" type="checkbox"/> In advertising the sale or rental of housing         | <input checked="" type="checkbox"/> In the appraisal of housing                        |
| <input checked="" type="checkbox"/> In the financing of housing                          | <input checked="" type="checkbox"/> Blockbusting is also illegal                       |

Anyone who feels he or she has been  
discriminated against may file a complaint of  
housing discrimination:

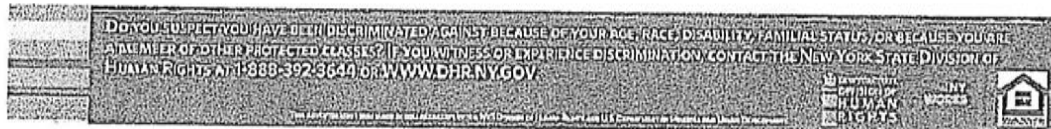
1-800-669-9777 (Toll Free)  
1-800-927-9275 (TTY)  
[www.hud.gov/fairhousing](http://www.hud.gov/fairhousing)

U.S. Department of Housing and  
Urban Development  
Assistant Secretary for Fair Housing and  
Equal Opportunity  
Washington, D.C. 20410

Posters and signs are available

(Form HUD-910.1 (6/2011))

HOUSING  
DISCRIMINATION IS  
SOMETIMES BLATANT,  
SOMETIMES  
BUT ALWAYS UNLAWFUL.





#### EXHIBIT D

##### **Requirements for Affirmative Marketing Plans for Housing Projects**

Affirmative marketing plans submitted by the Applicant shall be required only for affordable or "workforce" units and shall contain the following information:

1. Street address, village, town, zip code, and census tract number for the Project;
2. Number of affordable units to be marketed and whether they will be available for rent or purchase;
3. The number, if any, and location of market rate units included in the Project;
4. Whether the housing will be "housing for older persons", defined as at least 80% occupancy of units with at least one person 55 or older or 100% occupancy of persons age 62 or older;
5. A description of how units will be advertised for sale or rental prior to first occupancy, including whether Applicant will utilize its own website, commercial websites, print media outlets, social media outlets such as Facebook, a sign at the project site, mailings, leaflets/flyers, brochures, and other forms of advertising;
6. A statement that the Applicant will use fair housing logo or phrase "Equal Housing Opportunity" on all advertising described above;
7. A statement that the Applicant will distribute written information regarding the availability of affordable units at the project to a list of organizations provided to the Applicant by the Agency, which list may be updated annually;
8. Whether the Applicant will conduct the marketing and initial rent-up or sales itself or contract with a third-party;
9. A statement that an initial application period with a specific start and end date will be utilized for accepting applications for consideration for the initial rental of the units and that the period will last for at least thirty (30) days after the marketing described in this plan is commenced. In addition, a statement that following the initial application period, all the applications submitted during the initial application period will be considered through the use of a lottery and not on a first-come first-served basis, unless the number of applications received during the initial application period is less than the total number of units available for rental.
10. A statement that the Applicant will maintain records of the activities it undertakes to implement its marketing plan.

---

# COPPERLINE PARTNERS

July 18, 2018

Nassau County  
Industrial Development Agency  
1550 Franklin Avenue, Suite 235  
Mineola, New York, NY

Re: Millbrook Rental Apartments- Affirmative Marketing Plan

Dear Sir/Madam,

We have developed the following Affirmative Marketing Plan (the "AMP") for the affordable housing units to be located in the above referenced project.

The project is located at 240-250 Middleneck Road, Village of Great Neck, NY 11021. The census tract number is 3005.00.

Today the complex contains 119 units, we are adding 67 additional units (the "Project"), 7 of which will be designated as affordable housing rental units and spread throughout the existing and new buildings. The balance of the remaining units constituting the Project will be free market rental apartments.

The Project is not geared towards senior citizens, there are no age restrictions or requirements.

The affordable housing units will be marketed and managed by the owner, at the same on site leasing office the balance of the units are leased from. Additional marketing efforts will be through the Project web site, print, social media outlets and the site signage.

Project marketing materials will utilize the fair housing logo or phrase "Equal Housing Opportunity."

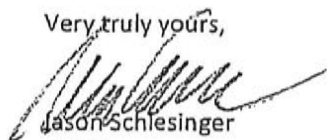
Marketing materials that describe the availability of the affordable housing will be available at the onsite leasing office and at other organizations and agencies that may be designated by the IDA. Records of such activities will be kept on site in the leasing center.

An initial application period with a specific start and end date will be utilized for accepting applications for consideration for the initial rental of the units and that the period will last for at least thirty (30) days after the marketing described in this plan is commenced. In addition, a statement that following the initial application period, all the applications submitted during the initial application period will be considered through the use of a lottery and not on a first come first serve basis, unless the number of applications received during the initial application period

is less than the total number of units for rent. Records will be maintained within our office as to the activities undertaken and materials utilized to implement the marketing plan.

If you have any questions regarding this plan, please feel free to reach out to me.

Very truly yours,

A handwritten signature in black ink, appearing to read "Jason Schlesinger", written over the printed name.

Jason Schlesinger

Agent

North Shore Millbrook LLC

ROBERT SCHLESINGER

Exhibit "E"

1. Gold Seal Apts.  
120 Unit Apartment Complex  
Queens Village, NY
2. Pershing Crescent Apts.  
108 Unit Apartment Complex  
Briarwood, NY
3. Queens Cedarcroft Apts.  
91 Unit Apartment Complex  
Forest Hills, NY
4. Queens Chadwick Co.  
124 Unit Apartment Complex  
Briarwood, NY
5. Queens Fulton Co.  
96 Unit Apartment Complex  
Jackson Heights, NY
6. Queens Penn Apts.  
96 Unit Apartment Complex  
Jackson Heights, NY
7. 35th Avenue Apts.  
84 Unit Apartment Complex  
Jackson Heights, NY
8. Hayes House Associates  
66 Unit Apartment Complex  
Hempstead, NY
9. North Shore Millbrook  
118 Unit Apartment Complex  
Great Neck, NY
10. CLP Villa  
132 Unit Apartment Complex  
Hempstead, NY
11. Morgan Gregory Apartments Co.  
238 Unit Apartment Complex  
Stamford, CT
12. Morningside Gardens  
69 Unit Apartment Complex  
Norwalk, CT
13. 65 & 77 Prospect Street  
Stamford, CT  
270 Unit Apt. Complex

14. Montoya Apartments  
154 Apartment Units  
Branford, Connecticut
15. Stamford Apartments Co.  
342 Unit Apartment Complex  
Stamford, CT
16. Mayfair Hotel  
178 Unit Hotel  
Coconut Grove, FL
17. Brazilian Court Hotel  
92 Unit Luxury Hotel  
Palm Beach, FL
18. CLP Waters (Innovo)  
194 Unit Apartment Complex  
Tampa Florida
19. Harbor Inn  
310 Unit Apartment Complex  
Coral Springs, FL
20. Marsh Harbour  
168 Unit Apartment Complex  
Sunrise, FL
21. Kent Avenue  
112 Unit Apartment Complex  
475 Kent Avenue  
Brooklyn, NY 11249
22. CLP 74 Leonard  
18 Unit Multi  
1 Retail  
New York City, NY
23. 1801 S. Australian  
Commercial Property  
West Palm Beach, FL
24. Little Torch Cottages  
48 Apartments  
Little Torch Key, FL
25. Tenere Management  
Real Estate Management
26. Wendy's Restaurant Investment

JASON SCHLESINGER

Exhibit "F"

	<u>Entity</u>	<u>Partnership Interest</u>
1.	Gold Seal Apts.	20.7800%
2.	Pershing Crescent Apts.	22.4430%
3.	Queens Cedarcroft Apts.	20.2150%
4.	Queens Chadwick Co.	20.1313%
5.	Queens Fulton Co.	21.1700%
6.	Queens Penn Apts.	20.2730%
7.	35th Avenue Apts.	23.3850%
8.	North Shore Millbrook	25.0000%
9.	CLP Villa	25.0000%
10.	Morgan Gregory Apartments Co.	19.1230%
11.	Morningside Gardens	1.5700%
12.	Collins Prospect LLC	4.9600%
13.	Ceebraid-Signal FL Company, Ltd.	2.7000%
14.	Stamford Apartments Co.	19.1230%
15.	Harbor Inn	24.7500%
21.	Marsh Harbour	24.7500%
22.	Kent Avenue	7.5000%
23.	1801 S. Australian	16.0000%

SUPREME COURT OF THE STATE OF NEW YORK  
COUNTY OF NASSAU

Exhibit "G"  
OC# 0221-0040

E

In the Matter of

NORTH SHORE MILLBROOK, LLC

PETITION

Index No.

Master Writ Index No.  
2018402844 OC# 0221-0040

Petitioner,

- against -

THE ASSESSOR AND/OR THE DEPARTMENT  
OF ASSESSMENT OF THE COUNTY OF NASSAU  
AND THE NASSAU COUNTY ASSESSMENT  
REVIEW COMMISSION,

Respondents,

The petitioner above-named by his attorney, CERTILMAN BALIN ADLER & HYMAN, LLP, respectfully  
alleges as follows:

1. At all times herein mentioned, petitioner was and still is an aggrieved party with respect to the assessment or assessments described below within the meaning of Section 706, Real Property Tax Law, State of New York, and the Assessor and/or the Department of Assessment of the County of Nassau and the Nassau County Assessment Review Commission are the respondents herein (hereinafter referred to as "the assessing jurisdiction").

2. The respondents have heretofore prepared, completed and perfected, purportedly according to law, an assessment roll for the assessing jurisdiction, for the tax year 2019 (2018/2019), which assessment roll included an assessment for petitioner's real property, described in Column I and assessed as set forth in Column II of the following schedule:

COLUMN I	COLUMN II	COLUMN III	COLUMN IV	COLUMN V
Town: N. Hempstead				
Village: Great Neck				
	Original Valuation	Claimed Valuation	Confirmed Valuation	Extent Unequal and/or Excessive
S.D. 07				
Sec. 2	Land \$ 38,938	\$ 9,735	*	\$ 29,203
Blk. 354	Total \$ 44,138	\$ 11,035	*	\$ 33,103
Lot 138				

\* Same as Column II except as otherwise indicated

3. Petitioner duly made and filed with respondents a written application and statement under oath, to have said assessed valuation, transition assessment and exemption, if applicable, of said real property corrected and revised, specifying therein the respect in which the assessment complained of was incorrect, and which application and statement sought to reduce the assessment complained of as set forth in Column III Paragraph 2 above. The application and statement are hereby referred to and made part hereof as though fully set forth herein.

4. Upon information and belief, a final decision and determination on the application and statement were duly rendered by respondents who failed to reduce the assessment as requested and confirmed or set the assessed valuation of petitioner's property as set forth in Column IV Paragraph 2 above.

5. Thirty days have not elapsed since the filing of the certified copy of the completed and verified assessment roll with notice thereof, or law day, whichever is later, as permitted by R.P.T.L. Sec. 702.

6. The assessment of petitioner's property is erroneous upon the following grounds: (a) Excessive, as fully defined in R.P.T.L. Sec. 522, (to the extent set forth in Column V Paragraph 2 above); (b) Misclassification, the class designation is incorrect, as fully defined in R.P.T.L. Sec. 522; (c) Unequal, as fully defined in R.P.T.L. Sec. 522, (to the extent set forth in Column V Paragraph 2 above). The assessed value is at a higher percentage of value than the assessed value of other real property in the same class on the assessment roll and/or the assessed value has been made at a higher proportionate value than the assessments of all other real property on the assessment roll. The specified instances of such unequal assessment is the assessments of all of the real property (or where applicable, in the same class on the same roll) in the assessing jurisdiction and each and every parcel thereof; (d) Unlawful, in that this property and all real property in the assessing unit is not assessed at a uniform percentage of value and that it is based upon an assessment practice of selective or spot reassessment that has been declared illegal and unconstitutional by the Courts of the State of New York, as defined in R.P.T.L., and is unlawful as more fully defined in its entirety in R.P.T.L. Sec. 522; and (e) Unlawful because it violates the transitional assessment provisions of RPTL Section 1805 in that the taxable equalized assessment has been increased above the 2002/03 tax year equalized assessment, in an amount greater than permitted by law.

6a. Each claim as set forth in Paragraph 6 above is defined in R.P.T.L. Sec. 522 and is incorporated herein as if fully set forth.

7. In the event that the assessment at issue is or should be subject to a transition assessment and/or exempt or partially exempt and has been incorrectly calculated, or not set forth at all on the taxable assessment roll, the assessment should be reduced as it exceeds the statutory formula and/or is unlawful, unequal and excessive.

8. Petitioner is aggrieved and injured by said unequal, excessive, illegal, unlawful and/or misclassified assessment (as defined in R.P.T.L. Sec. 522), and will be required to pay a greater amount and proportion of taxes than petitioner would be required to pay if the assessment had been equal and not excessive, illegal, unlawful, misclassified and erroneous.

9. No provision is made by law for an appeal or other relief from the final determination of the respondents except by a review by petition to the Supreme Court. No previous application for the relief herein asked has been made to any court or judge.

10. If there is more than one petitioner herein, the word "petitioner" shall mean "petitioners" or "each of the petitioners" as the context requires. As used herein the singular shall include the plural and the plural shall include the singular as the context requires.

11. Petitioner protests payment of said taxes based upon the within claims and upon the grounds that the tax rates are calculated incorrectly.

12. Petitioners are persons asserting grounds for review which present common questions of law or fact within the meaning of R.P.T.L. Sec. 706(2).

13. R.P.T.L. 581-A requires Assessors to determine the assessment of subsidized housing by the income approach using actual net operating income.

WHEREFORE, petitioner prays that the Supreme Court review and correct on the merits the final determination of respondents on the grounds set forth in this petition, and that the Court take evidence to enable petitioner to show the unequal, excessive, unlawful, illegal, misclassified and erroneous assessment of the real property to the end that the assessment may be reduced to the value thereof for land and improvements, and to a valuation proportionate to the assessments of other real property, and/or other property in the same class, assessed on the same rolls for the same year, so that equality of assessments will result, and may be properly classified, and for such other and further relief as the Court may deem proper, together with the costs and disbursements of this proceeding.



SUPREME COURT OF THE STATE OF NEW YORK  
COUNTY OF NASSAU

OC# 0221-0040

E

-----X  
In the Matter of

NORTH SHORE MILLBROOK, LLC

NOTICE AND PETITION

Index No.

Petitioner,

- against -

THE ASSESSOR AND/OR THE DEPARTMENT  
OF ASSESSMENT OF THE COUNTY OF NASSAU  
AND THE NASSAU COUNTY ASSESSMENT  
REVIEW COMMISSION,

Respondents,

-----X  
CERTILMAN BALIN ADLER & HYMAN, LLP  
90 MERRICK AVENUE  
EAST MEADOW, NY 11554  
516 296-7000

VERIFICATION

STATE OF NEW YORK, COUNTY OF NASSAU ss.:

The undersigned, being duly sworn, deposes and says: I am the agent for the petitioner herein. I have read the foregoing petition and know the contents thereof; the same is true to my own knowledge, except as to matters therein stated to be alleged upon information and belief and, that as to those matters, I believe it to be true. The reason this verification is made by me and not by petitioner is that all the material allegations (except those as to matters of public record) of said petition are within my personal knowledge.

/S/ \_\_\_\_\_  
Rebecca Sklar

Sworn to before me this day:  
April 2, 2018

/S/ \_\_\_\_\_  
Barbara Rosenblatt  
Notary Public State of New York  
No. 01R04779260, Suffolk County  
Term Expires Sept. 30, 2021

NOTICE OF PETITION

TO THE RESPONDENTS NAMED WITHIN: PLEASE TAKE NOTICE THAT, upon the annexed verified petition, an application will be made, pursuant to the provisions of the Real Property Tax Law at a Special Term for Tax Certiorari of this Court, to be held at the courthouse thereof, on June 4, 2018 at 9:30 a.m., or as soon thereafter as counsel can be heard, for the relief prayed for in said petition, upon the grounds set forth therein, and for such other and further relief as may be just and proper in the premises.

Dated: April 2, 2018

CERTILMAN BALIN ADLER & HYMAN, LLP  
90 MERRICK AVENUE  
EAST MEADOW, NY 11554  
516 296-7000

## AUTHORIZATION

I, the undersigned, being an aggrieved person within the meaning of the Real Property Tax Law, or an officer or partner of such aggrieved person, as complainant, hereby designate and authorize the below named law firm or any other attorney designated by said firm, to act as my representative in any and all proceedings before the Board of Assessment Review or in Nassau County, the Nassau County Assessment Review Commission, of the municipalities mentioned below for purposes of reviewing the assessment of my real property as it appears on the assessment roll of such municipalities for the proceedings applicable to the date set forth below and to act as agent to verify, serve and file a petition for review of said real property assessment pursuant to Section 706 or 730 of the Real Property Tax Law and this applies to property described below as follows:

LAW FIRM: CERTILMAN BALIN ADLER & HYMAN  
COUNTY: Nassau  
TOWN: North Hempstead  
CITY: (if applicable)  
VILLAGE: (if applicable) Great Neck  
DESCRIPTION: S.D. 7  
Section 2 Block 354 Lot(s) 138

NORTH SHORE MILLBROOK, LLC

(Name of Petitioner)

By:

(Signature)

(Date)

(Please Print Signature Above)

Title (i.e., Owner, Partner or Officer)

JAN - 3 2017

Our File No. 0221-0040  
05  
SCHWAROB

Tax Year 2018/19

SUPREME COURT OF THE STATE OF NEW YORK  
COUNTY OF NASSAU

OC# 0221-0040

-----X  
In the Matter of  
NORTH SHORE MILLBROOK, LLC

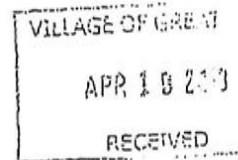
PETITION

Index No.

Petitioner,  
- against -

THE BOARD OF ASSESSORS AND/OR THE  
ASSESSOR OF THE VILLAGE OF GREAT NECK  
AND THE BOARD OF ASSESSMENT REVIEW,

Respondents.  
-----X



The petitioner above-named by his attorney, CERTILMAN BALIN ADLER & HYMAN, LLP, respectfully alleges as follows:

1. At all times herein mentioned, petitioner was and still is an aggrieved party with respect to the assessment or assessments described below within the meaning of Section 706, Real Property Tax Law, State of New York, and the Board of Assessors and/or Assessor is the respondent herein (hereinafter referred to as "the assessing jurisdiction").
2. The respondents have heretofore prepared, completed and perfected, purportedly according to law, an assessment roll for the assessing jurisdiction, for the tax year 2019 (2018/2019), which assessment roll included an assessment for petitioner's real property, described in Column I and assessed as set forth in Column II of the following schedule:

<u>COLUMN I</u>	<u>COLUMN II</u>	<u>COLUMN III</u>	<u>COLUMN IV</u>	<u>COLUMN V</u>
Town: North Hempstead				
Village: Great Neck				
	Original Valuation	Claimed Valuation	Confirmed Valuation	Extent Unequal and/or Excessive
S.D. 07				
Sec. 2	Land \$ 3,520,000	\$ 880,000	*	\$ 2,640,000
Blk. 354	Total \$ 9,772,600	\$ 2,443,150	*	\$ 7,329,450
Lot 138 (TYPE: APARTMENTS)				

\* Same as Column II except as otherwise indicated

3. Petitioner duly made and filed with respondents a written application and statement under oath, to have said assessed valuation, transition assessment and exemption, if applicable, of said real property corrected and revised, specifying therein the respect in which the assessment complained of was incorrect, and which application and statement sought to reduce the assessment complained of as set forth in Column III Paragraph 2 above. The application and statement are hereby referred to and made part hereof as though fully set forth herein.

4. Upon information and belief, a final decision and determination on the application and statement were duly rendered by respondents who failed to reduce the assessment as requested and confirmed or set the assessed valuation of petitioner's property as set forth in Column IV Paragraph 2 above.

5. Thirty days have not elapsed since the filing of the certified copy of the completed and verified assessment roll with notice thereof, or law day, whichever is later, as permitted by R.P.T.L. Sec. 702.

6. The assessment of petitioner's property is erroneous upon the following grounds: (a) Excessive, as fully defined in R.P.T.L. Sec. 522, (to the extent set forth in Column V Paragraph 2 above); (b) Misclassification, the class designation is incorrect, as fully defined in R.P.T.L. Sec. 522; (c) Unequal, as fully defined in R.P.T.L. Sec. 522, (to the extent set forth in Column V Paragraph 2 above). The assessed value is at a higher percentage of value than the assessed value of other real property in the same class on the assessment roll and/or the assessed value has been made at a higher proportionate value than the assessments of all other real property on the assessment roll. The specified instances of such unequal assessment is the assessments of all of the real property (or where applicable, in the same class on the same roll) in the assessing jurisdiction and each and every parcel thereof; and (d) Unlawful, in that this property and all real property in the assessing unit is not assessed at a uniform percentage of value and that it is based upon an assessment practice of selective or spot reassessment that has been declared illegal and unconstitutional by the Courts of the State of New York, as defined in R.P.T.L., and is unlawful as more fully defined in its entirety in R.P.T.L. Sec. 522.

6a. Each claim as set forth in Paragraph 6 above is defined in R.P.T.L. Sec. 522 and is incorporated herein as if fully set forth.

7. In the event that the assessment at issue is or should be subject to a transition assessment and/or exempt or partially exempt and has been incorrectly calculated, or not set forth at all on the taxable assessment roll, the assessment should be reduced as it exceeds the statutory formula and/or is unlawful, unequal and excessive.

8. Petitioner is aggrieved and injured by said unequal, excessive, illegal, unlawful and/or misclassified assessment (as defined in R.P.T.L. Sec. 522), and will be required to pay a greater amount and proportion of taxes than petitioner would be required to pay if the assessment had been equal and not excessive, illegal, unlawful, misclassified and erroneous.

9. No provision is made by law for an appeal or other relief from the final determination of the respondents except by a review by petition to the Supreme Court. No previous application for the relief herein asked has been made to any court or judge.

10. If there is more than one petitioner herein, the word "petitioner" shall mean "petitioners" or "each of the petitioners" as the context requires. As used herein the singular shall include the plural and the plural shall include the singular as the context requires.

11. Petitioner protests payment of said taxes based upon the within claims and upon the grounds that the tax rates are calculated incorrectly.

12. Petitioners are persons asserting grounds for review which present common questions of law or fact within the meaning of R.P.T.L. Sec. 706(2).

13. R.P.T.L. 581-A requires Assessors to determine the assessment of subsidized housing by the income approach using actual net operating income.

WHEREFORE, petitioner prays that the Supreme Court review and correct on the merits the final determination of respondents on the grounds set forth in this petition, and that the Court take evidence to enable petitioner to show the unequal, excessive, unlawful, illegal, misclassified and erroneous assessment of the real property to the end that the assessment may be reduced to the value thereof for land and improvements, and to a valuation proportionate to the assessments of other real property, and/or other property in the same class, assessed on the same rolls for the same year, so that equality of assessments will result, and may be properly classified, and for such other and further relief as the Court may deem proper, together with the costs and disbursements of this proceeding.

SUPREME COURT OF THE STATE OF NEW YORK  
COUNTY OF NASSAU

OC# 0221-0040

-----X  
In the Matter of

NORTH SHORE MILLBROOK, LLC

NOTICE AND PETITION

Index No.

Petitioner,  
- against -

THE BOARD OF ASSESSORS AND/OR THE  
ASSESSOR OF THE VILLAGE OF GREAT NECK  
AND THE BOARD OF ASSESSMENT REVIEW,

Respondents.

-----X  
CERTILMAN BALIN ADLER & HYMAN, LLP  
90 MERRICK AVENUE  
EAST MEADOW, NY 11554  
516 296-7000

VERIFICATION

STATE OF NEW YORK, COUNTY OF NASSAU) ss.:

The undersigned, being duly sworn, deposes and says: I am the agent for the petitioner herein. I have read the foregoing petition and know the contents thereof; the same is true to my own knowledge, except as to matters therein stated to be alleged upon information and belief and, that as to those matters, I believe it to be true. The reason this verification is made by me and not by petitioner is that all the material allegations (except those as to matters of public record) of said petition are within my personal knowledge.

/S/ \_\_\_\_\_  
Rebecca Sklar

Sworn to before me this day  
April 2, 2018

/S/ \_\_\_\_\_  
Barbara Rosenblatt  
Notary Public State of New York  
No. 01R04779260, Suffolk County  
Term Expires Sept. 30, 2021

NOTICE OF PETITION

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90 MERRICK AVENUE  
EAST MEADOW, NY 11554  
516 296-7000

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I, the undersigned, being an aggrieved person within the meaning of the Real Property Tax Law, or an officer or partner of such aggrieved person, as complainant, hereby designate and authorize the below named law firm or any other attorney designated by said firm, to act as my representative in any and all proceedings before the Board of Assessment Review or in Nassau County, the Nassau County Assessment Review Commission, of the municipalities mentioned below for purposes of reviewing the assessment of my real property as it appears on the assessment roll of such municipalities for the proceedings applicable to the date set forth below and to act as agent to verify, serve and file a petition for review of said real property assessment pursuant to Section 706 or 730 of the Real Property Tax Law and this applies to property described below as follows:

LAW FIRM: CERTILMAN BALIN ADLER & HYMAN, LLP  
COUNTY: Nassau  
TOWN: North Hempstead  
CITY: (if applicable)  
VILLAGE: (if applicable) Great Neck  
DESCRIPTION: S.D. 7  
Section 2 Block 354 Lot(s) 138 (TYPE: APARTMENTS)

NORTH SHORE MILLBROOK, LLC

\_\_\_\_\_  
(Name of Petitioner)

JAN - 2 2018

By: \_\_\_\_\_

(Signature)

(Date)

\_\_\_\_\_  
(Please Print Signature Above)

\_\_\_\_\_  
Title (i.e., Owner, Partner or Officer)

Our File No. 0221-0040  
02V  
SCHWAROB

Tax Year 2018/19

SUPREME COURT OF THE STATE OF NEW YORK  
COUNTY OF NASSAU

OC# 0221-0040

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In the Matter of  
NORTH SHORE MILLBROOK, LLC

PETITION

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- against -

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ASSESSOR OF THE VILLAGE OF GREAT NECK  
AND THE BOARD OF ASSESSMENT REVIEW,

VILLAGE OF GREAT NECK

APR 20 2017

RECEIVED

Respondents.  
-----X

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COLUMN I	COLUMN II	COLUMN III	COLUMN IV	COLUMN V
Town: North Hempstead				
Village: Great Neck				
	Original Valuation	Claimed Valuation	Confirmed Valuation	Extent Unequal and/or Excessive
S.D. 07				
Sec. 2	Land \$ 3,289,700	\$ 822,425	*	\$ 2,467,275
Blk. 354	Total \$ 9,133,300	\$ 2,283,325	*	\$ 6,849,975
Lot 138 (TYPE: APARTMENTS)				

\* Same as Column II except as otherwise indicated



3. Petitioner duly made and filed with respondents a written application and statement under oath, to have said assessed valuation, transition assessment and exemption, if applicable, of said real property corrected and revised, specifying therein the respect in which the assessment complained of was incorrect, and which application and statement sought to reduce the assessment complained of as set forth in Column III Paragraph 2 above. The application and statement are hereby referred to and made part hereof as though fully set forth herein.

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6. The assessment of petitioner's property is erroneous upon the following grounds: (a) Excessive, as fully defined in R.P.T.L. Sec. 522, (to the extent set forth in Column V Paragraph 2 above); (b) Misclassification, the class designation is incorrect, as fully defined in R.P.T.L. Sec. 522; (c) Unequal, as fully defined in R.P.T.L. Sec. 522, (to the extent set forth in Column V Paragraph 2 above). The assessed value is at a higher percentage of value than the assessed value of other real property in the same class on the assessment roll and/or the assessed value has been made at a higher proportionate value than the assessments of all other real property on the assessment roll. The specified instances of such unequal assessment is the assessments of all of the real property (or where applicable, in the same class on the same roll) in the assessing jurisdiction and each and every parcel thereof; and (d) Unlawful, in that this property and all real property in the assessing unit is not assessed at a uniform percentage of value and that it is based upon an assessment practice of selective or spot reassessment that has been declared illegal and unconstitutional by the Courts of the State of New York, as defined in R.P.T.L., and is unlawful as more fully defined in its entirety in R.P.T.L. Sec. 522.

6a. Each claim as set forth in Paragraph 6 above is defined in R.P.T.L. Sec. 522 and is incorporated herein as if fully set forth.

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12. Petitioners are persons asserting grounds for review which present common questions of law or fact within the meaning of R.P.T.L. Sec. 706(2).

13. R.P.T.L. 581-A requires Assessors to determine the assessment of subsidized housing by the income approach using actual net operating income.

WHEREFORE, petitioner prays that the Supreme Court review and correct on the merits the final determination of respondents on the grounds set forth in this petition, and that the Court take evidence to enable petitioner to show the unequal, excessive, unlawful, illegal, misclassified and erroneous assessment of the real property to the end that the assessment may be reduced to the value thereof for land and improvements, and to a valuation proportionate to the assessments of other real property, and/or other property in the same class, assessed on the same rolls for the same year, so that equality of assessments will result, and may be properly classified, and for such other and further relief as the Court may deem proper, together with the costs and disbursements of this proceeding.



SUPREME COURT OF THE STATE OF NEW YORK  
COUNTY OF NASSAU

OC# 0221-0040

-----X  
In the Matter of

NOTICE AND PETITION

NORTH SHORE MILLBROOK, LLC

Index No.

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- against -

THE BOARD OF ASSESSORS AND/OR THE  
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AND THE BOARD OF ASSESSMENT REVIEW,

Respondents.

-----X  
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90 MERRICK AVENUE  
EAST MEADOW, NY 11554  
516 296-7000

VERIFICATION

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/S/ \_\_\_\_\_  
Rebecca Sklar

Sworn to before me this day  
- April 3, 2017

/S/ \_\_\_\_\_  
BARBARA ROSENBLATT  
Notary Public State of New York  
No. 4779260, Suffolk County  
Term Expires September 30, 2017

NOTICE OF PETITION

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NORTH SHORE MILLBROOK, LLC

(Name of Petitioner)

JAN - 3 - 2017

By:

(Signature)

(Date)

(Please Print Signature Above)

Title (i.e., Owner, Partner or Officer)

Our File No. 0221-0040  
02V  
SCHWAROB

Tax Year 2017/18

SUPREME COURT OF THE STATE OF NEW YORK  
COUNTY OF NASSAU

OC# 0221-0040

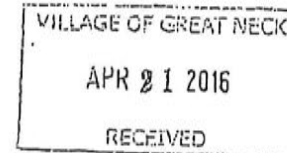
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In the Matter of  
NORTH SHORE MILLBROOK, LLC

PETITION

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SUPREME COURT OF THE ST. OF NEW YORK  
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C 0221-0040

-----X  
In the Matter of

NORTH SHORE MILLBROOK, LLC

NOTICE AND PETITION

Index No.

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516 296-7000

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/s/ \_\_\_\_\_  
Rebecca Sklar

Sworn to before me this day  
April 1, 2016

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90 MERRICK AVENUE  
EAST MEADOW, NY 11554  
516 296-7000

A U T H O R I Z A T I O N

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DESCRIPTION: S.D. 7  
Section 2 , Block 354  
Lot(s) 138 (TYPE: APARTMENTS)

NORTH SHORE MILLBROOK, LLC  
(Name of Petitioner)

By: \_\_\_\_\_

(Signature)

JAN - 4 2016

Robert Schwartz  
(Please Print Signature Above)

CEO Asset  
Title (i.e., Owner, Partner or Officer)

Our File No. 0221-0040

02V

SCHWARTZ