

Qualified Venture Firm Application Example Requested Document List¹

1	Valid New Jersey Tax Clearance Certificate ²
2	Russia Belarus Non-Involvement Certification
3	Limited Partnership or Limited Liability Company Agreement for the Qualified Venture Firm Active Fund ³
4	Most recent annual audited financial statement(s) of all funds under management ⁴
5	Most recent quarterly financial statement(s) of all funds under management ⁴
6	Private Placement Memorandum of the Qualified Venture Firm Active Fund
7	Most recent presentation deck of the Qualified Venture Firm Active Fund
8	Current organizational charts and biographical backgrounds of the applicant
9	Current policies or plans for DE&I and documentation evidencing the venture firm's compliance or progress with such policies, if applicable
10	List of all office locations and copy of associated lease agreements in the State, if applicable ⁵
11	Stock Purchase Agreements or Executed Term Sheets of prior New Jersey Investments, if applicable ⁶
12	Executed Subscription Documents of the Qualified Venture Firm Active Fund, if applicable ⁷
13	New Jersey incentive area investment policy, if applicable ⁸

Note¹: Equivalent alternative forms of documentation may be accepted. Possible examples may be found in the Qualified Venture Firm scoring rubric available through the program [website](#).

Note²: Instructions how to obtain a tax clearance certificate [here](#).

Note³: Qualified Venture Firm Active Fund means the entity managed by the qualified venture firm or an affiliate of the qualified venture firm from which the qualified venture firm invests in a qualified business alongside the qualified investment.

Note⁴: All Qualified Venture Firms must demonstrate they maintain at least \$10 million in assets under management. Financial statements must be dated within 150 days of the date the certification as Qualified Venture Firm is made. As described in section 19:31-25.7 (d) 1 of the [program regulations](#).

Note⁵: Applicants may receive points under the program's weighted criteria evaluation model. Documentation relates to Question #5 of the Venture Firm Information section of the application.

Note⁶: Applicants may receive points under the program's weighted criteria evaluation model. Documentation relates to Question #6 of the Venture Firm Information section of the application.

Note⁷: Applicants may receive points under the program's weighted criteria evaluation model. Documentation relates to Question #12 of the Venture Firm Information section of the application.

Note⁸: Applicants may receive points under the program's weighted criteria evaluation model. Documentation relates to Question #15 of the Venture Firm Information section of the application.