



# Portfolio Review Terms and Conditions

---

## 1. Documentation Requirements

1.1 All required documentation must be complete and ready for submission at the time of registration.

1.2 If complete documentation is not submitted within five (5) business days of registration, the portfolio review will be cancelled, and the applicant's spot may be offered to the next eligible participant.

---

## 2. Payment Terms

2.1 The portfolio review process will not commence until full payment has been received.

2.2 If payment is not received within five (5) business days of issuance of the invoice, the portfolio review will be cancelled, and the applicant's spot may be offered to the next eligible participant.

---

## 3. Key Dates and Deadlines

3.1 Registration must be completed no later than **May 1, 2026**.

3.2 Initial portfolio reviews will be completed by **June 26, 2026**.

3.3 Applicants will have twenty-five (25) business days from receipt of review feedback to respond to and provide any updated or additional documentation.

3.4 If updated documentation is not submitted within the required timeframe, BOMA BEST reserves the right to discontinue the portfolio review. In such cases, no refund will be issued.

3.5 All portfolio reviews must be fully completed no later than **August 21, 2026**.



#### **4. Validity of Portfolio Review**

4.1 A completed portfolio review is valid for five (5) years from the date of approval or until the applicable program version is updated, whichever occurs first.

---

#### **5. Documentation Upload Requirements**

5.1 Questions designated as “Fully Approved” do not require supporting documentation to be uploaded to the Hub.

5.2 Questions designated as “Preapproved” require only building-specific information to be uploaded to the Hub.

---

#### **6. Building Verifications**

6.1 Verifications for individual buildings within a portfolio may not be requested until the portfolio review has been completed.

6.2 Any verification requests submitted prior to completion of the portfolio review will be reverted.

---

By signing below, applicants acknowledge and agree to comply with these Terms and Conditions.

Note that the signing authority is reserved for management-level personnel responsible for governing the portfolio level documentation or the BOMA BEST submissions.

By (Signature): \_\_\_\_\_

Date: \_\_\_\_\_

Name (Printed): \_\_\_\_\_

Title: \_\_\_\_\_