

**100% LIHTC PROPERTY
TENANT INCOME SELF RECERTIFICATION**

** Used only from 2nd Tenant Recertification and Forward**

Effective Date: _____
Move-in Date: _____
(MM/DD/YYYY)
Total Household Size at Move-in: _____

PART I - DEVELOPMENT DATA

Property Name: _____ BIN: _____
Address: _____ Unit # _____ # Bedrooms: _____

HH Mbr #	Last Name	First Name & Middle Initial	Relationship to Head of Household	Date of Birth (MM/DD/YYYY)	Social Security or Alien Reg. No.
1			HEAD		
2					
3					
4					
5					
6					
7					

PART III. GROSS ANNUAL INCOME:

PART IV. STUDENT STATUS

HH Mbr #	Total Household Income from all Sources at 2 nd Annual Recertification	Full Time Student? (Yes/No)	*Student Explanation
1	\$		
2	\$		
3	\$		
4	\$		
5	\$		
6	\$		
7	\$		

*Student Exemption/Explanation:
(A) TANF Assistance
(B) Job Training Program
(C) Single Parent/Dep. Child
(D) Married/Joint Return
(E) Former Foster Child
(F) Other (Will need explanation)

Note: Owners/Managers should prepare an income/asset questionnaire to assist tenant/household in determining gross annual income.

TOTAL HH INCOME AT RECERT:

\$

TOTAL HH INCOME @ MOVE-IN: \$ _____

PART V. RENT

Tenant Paid Rent \$ _____
Utility Allowance \$ _____

Rent Assistance: \$ _____
Other non-optional charges: \$ _____

GROSS RENT FOR UNIT:
(Tenant paid rent plus Utility Allowance & other non-optional charges)

\$

Unit Meets Income Restriction at:
0 60% 0 50% 0 40% 0 30% 0 other ____%

Maximum Rent Limit for this unit: \$ _____ 0 60% 0 50% 0 40% 0 30% 0 > 140%

HOUSEHOLD CERTIFICATION & SIGNATURES

The information on this form will be used to determine continuing eligibility. I/we agree to notify the Landlord immediately upon any member of the household moving out of the unit or any new member moving in. I/we agree to notify the landlord immediately upon any member becoming a full time student.

Under penalties of perjury, I/we certify that the information presented in this Certification is true and accurate to the best of my/our knowledge and belief. The undersigned further understands that providing false representations herein constitutes an act of fraud. False, misleading or incomplete information may result in the termination of the lease agreement.

Signature (Date) Signature (Date)

Signature (Date) Signature (Date)

SIGNATURE OF OWNER/REPRESENTATIVE

Based on the representations herein and upon the proofs and documentation required to be submitted, the individual(s) named in Part II of this Tenant Income Certification is/are eligible under the provisions of Section 42 of the Internal Revenue Code, as amended, and the Land Use Restriction Agreement (if applicable), to live in a unit in this Project.

SIGNATURE OF OWNER/REPRESENTATIVE Date



**INSTRUCTION FOR COMPLETING 100% LIHTC PROPERTY
TENANT INCOME SELF RECERTIFICATION**

(This form is to be completed by the owner or an authorized representative.)

Effective Date: Enter the effective date of the certification. The effective date should be no later than one year from the effective date of the previous (re)certification.

Move-in Date: Enter the date that the tenant/household initially took occupancy of the unit.

(MM/DD/YYYY): Enter month, day and year of initial move-in date.

Total HH Size: Enter # of Household members at move-in.

Part I – Development Data

Property Name: Enter the name of the development.

BIN #: Enter the Building Identification Number (BIN) assigned to the building (from IRS Form 8609).

Address: Enter the address of the building.

Unit Number: Enter the unit number.

Bedrooms: Enter the number of bedrooms in the unit.

Part II - Household Composition

List all occupants of the unit. State each household member’s relationship to the head of household by using one of the following coded definitions:

- | | |
|-----------------------|--------------------------------|
| H – Head of Household | S – Spouse |
| A – Adult co-tenant | O – Other family member |
| C – Child | F – Foster child(ren)/adult(s) |
| L – Live-in caretaker | N – None of the above |

Enter the date of birth and social security number (not required at this time for the LIHTC program) or alien registration number for each occupant. If there are more than 7 occupants, use an additional recertification form to list the remaining household members and attach it to page 1 of the recertification.

Part III – Gross Annual Income

Refer to the HUD Handbook 4350.3 for complete instructions on basic income verification and calculation of income from assets, including acceptable forms of verification.

Income is to be reported for each household member. Household members should provide the owner/management company with sufficient income/asset details to indicate total gross household income.

Although third party verification forms are not necessary to determine income and assets under the 100% LIHTC Property Tenant Income Recertification, it is suggested that such information through 1st party (tenant/household member) be obtained to support gross annual income anticipated to be received during the twelve months from the effective date of the certification. If household composition/individuals differ from the prior certification, file clarification is to be included.

Income can include, however not limited to, wages, social security, unemployment benefits, supplemental security income, pensions, military retirement, pensions, State of Alaska Permanent Fund Dividend, State of Alaska Senior Stipend, child support, public assistance (i.e. TANF, general assistance, disability, etc.) annuities, whole life benefits, etc., income from checking and savings accounts, income from real property land, homes etc.) and any and all other income regularly received by the household.

If individual household member's **assets** total less than \$5,000, owner/managers of LIHTC developments have the option of completing an under \$5000 form or verifying individual assets.

Part IV - Student Status

All household members are to identify student status*. If a student, household member exemption and or explanation is to be provided.

**Full time is determined by the school the student attends.*

Part V - Rent

- Tenant Paid Rent: Enter the amount the tenant pays toward rent (not including rent assistance payments such as Section 8).
- Rent Assistance: Enter the amount of rent assistance, if any.
- Utility Allowance: Enter the utility allowance. If the owner pays all utilities, enter zero.
- Other non-optional charges: Enter the amount of non-optional charges, such as mandatory garage rent, storage lockers, charges for services provided by the development, etc.
- Gross Rent for Unit: Enter the total of Tenant Paid Rent plus Utility Allowance and other non-optional charges.
- Maximum Rent Limit for this unit: Enter the maximum allowable gross rent for the unit.
- Unit Meets Rent Restriction at: Check the appropriate rent restriction that the unit meets according to what is required by the set-aside(s) for the project.
- Current Income Limit x 140%: For recertifications only. Multiply the Current Maximum Income Limit by 140% and enter the total. Below, indicate whether the household income exceeds that total. If the Gross Annual Income at recertification is greater than 140% of the current income limit, then the available unit rule must be followed.

HOUSEHOLD CERTIFICATION AND SIGNATURES

After providing income, asset, and student status information, each adult household member (age 18 or older) must sign and date the '100% LIHTC Property Tenant Income Self Recertification'.

SIGNATURE OF OWNER/REPRESENTATIVE

It is the responsibility of the owner or the owner's representative to sign and date the '100% LIHTC Property Tenant Income Self Recertification' immediately following execution by the resident(s).

The responsibility of documenting and determining continued eligibility (including completing and signing the Tenant Income Certification form) and ensuring such documentation is kept in the tenant file is extremely important and should be conducted by someone well trained in tax credit compliance.

These instructions should not be considered a complete guide on tax credit compliance. The responsibility for compliance with federal program regulations lies with the owner of the building(s) for which the credit is allowable.