



9 percent final allocation application checklist

All documents must be uploaded to your workcenter. For questions and workcenter set-up, contact Rhonda Housden at rhousden@chfainfo.com. Additional instruction for uploading documents will be available in your workcenter. Send email notification to Rhonda once the upload of all required documents is complete.

<input checked="" type="checkbox"/>	#	document	hard copy	electronic
<input type="checkbox"/>	1	Use current Housing Credit (Excel) application, with all worksheet tabs highlighted in green completed, including the Cost Summary Worksheet and scoring criteria. On the Development Budget worksheet, enter the costs from the Carryover application in column E and, if applicable, an explanation of the change in costs in column G.		Excel
<input type="checkbox"/>	2	Application fee, if not paid with the Carryover Application (all fees are non-refundable); wiring instructions are located in the workcenter	X	Or wired
<input type="checkbox"/>	3	General Contractor contract, and final schedule of values of construction costs (AIA form G702 and G703); these costs must be entered on the Cost Summary Tab in the application.		PDF
<input type="checkbox"/>	4	Executed certifications for Applicant, Sources and Uses; these certification templates are located on CHFA's website at chfainfo.com/arh/lihtc/Pages/Application_Final-Documents.aspx .		PDF
<input type="checkbox"/>	5	For multiple buildings claiming acquisition credit, provide a separate spreadsheet showing the calculation of credit for each building with a breakout of acquisition credits vs rehab credits.		Excel
<input type="checkbox"/>	6	Narrative describing changes from the Carryover Application.		
<input type="checkbox"/>	7	Financing documentation for all funding sources (can be in the form of a Promissory Note). If claiming Energy Tax Credits, provide breakout of how the investor calculated the proceeds and credit. Note any changes occurring since carryover, including amendments to the partnership agreement.		PDF
<input type="checkbox"/>	8	Partial Subordination from all lien holder(s) (unless previously submitted with the Placed-in-Service Application)		PDF
<input type="checkbox"/>	9	<p>CHFA will accept one of the following four sources for Utility Allowance: Local Public Housing Authority, Actual Usage and Rate Estimate, HUD Utility Schedule Model, or Energy Consumption Model. Utility Allowance schedules from the local Public Housing Authority must have the appropriate amounts circled.</p> <p>Applicants relying on the HUD Utility Schedule Model or the Energy Consumption Model must have received approval prior to the preliminary LIHTC application submission. The Applicant must submit an updated request for final approval, including all required documents and fees, to CHFA's Multifamily Program Compliance department between 30 and 60 days before the property begins leasing.</p> <p>For detailed requirements, see CHFA's Multifamily Utility Allowance Policy at chfainfo.com/arh/asset/Pages/lihtc-compliance.aspx.</p> <p>For 100-percent USDA Rural Development projects, use the applicable utility allowances from Rural Development. For HUD Project-based Section 8 properties, use the project-specific utility allowances approved by HUD.</p>		PDF



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<input type="checkbox"/>	10	Agreement with local public housing authority that the project is giving a preference for tenants from their waitlist		PDF
<input type="checkbox"/>	11	Accountant Opinion by an independent tax accountant, including the correct tax identification number and legal ownership name. Tax ID number and Entity Name must match the Contact Information Worksheet in the Excel Application. Opinions must follow CHFA's Accountant Opinion template at: chfainfo.com/arh/lihtc/Pages/Application_Final-Documents.aspx		PDF
<input type="checkbox"/>	12	Attorney Opinion by independent tax attorney, including the correct tax identification number and legal ownership. Entity Name must match the Contact Information Worksheet in the Excel Application. Use CHFA's Attorney Opinion Template at chfainfo.com/arh/lihtc/Pages/Application_Final-Documents.aspx		PDF
<input type="checkbox"/>	13	Form C-1, total square footage; must match the unit mix and rents and final building profile in the Excel Application		Excel
<input type="checkbox"/>	14	Certificate of Occupancy and/or Temporary Certificate of Occupancy for every building; Certificate of Substantial Completion for rehabilitation projects for acquisition credits, proof of the date the project was placed in service for acquisition purposes (unless previously submitted with the Placed-in-Service Application)		PDF
<input type="checkbox"/>	15	Building photos identified by address and BIN (unless previously submitted with the Placed-in-Service Application)		PDF
<input type="checkbox"/>	16	Form 8609 Certificate, at chfainfo.com/arh/lihtc/lihtc_application_documents/8609certificate.doc , detailing placed-in-service date for every building; must match the TCOs, COs, or Certificate of Substantial Completion (unless previously submitted with the Placed-in-Service Application)		PDF
<input type="checkbox"/>	17	All owner representatives, their management agent representatives, onsite staff, and any other staff involved in qualifying households will be required to successfully complete a compliance training session conducted or approved by CHFA prior to the release of IRS Form 8609 for Federal Credits		PDF
<input type="checkbox"/>	18	Compliance monitoring fee (unless previously submitted with the Placed-in-Service Application); all fees are non-refundable. Wiring instructions are available in your workcenter.	X	Or wired
<input type="checkbox"/>	19	EGC Workbook with "Final" column completed (waiver/workaround documentation must be submitted; please follow workbook instructions); applies to projects following Option B in Section 8 of the 2020 QAP as well as projects awarded in 2019 or prior.		Excel
<input type="checkbox"/>	20	Energy Efficiency Election Form (fully executed) at chfainfo.com/arh/lihtc/lihtc_application_documents/Energy-Efficiency-Election-Form.pdf		PDF
<input type="checkbox"/>	21	Green standard; provide final proof of EGC, LEED, or NGBS Certification and ZERH, PHI, PHIUS, if applicable, or proof of filing for Final Certification upon project completion.		PDF