INSTRUCTIONS FOR COMPLETING

SELF TENANT INCOME CERTIFICATION

This form is to be completed by 100% LIHTC properties ONLY.

Part I - III is to be completed by owner or an authorized representative.
Part IV is to be completed by the Tenant.
Official Use Only box is to be completed by owner or an authorized representative.

Part I - Development Data

Property Name Enter the name of the development.
Address Enter the address of the building.
Unit Number Enter the unit number.

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 student status for each occupant. If there are more than 7 occupants, use an additional sheet of paper to list the remaining household members and attach it to the certification.

Part III - Annual Income

Income is determined on the annual gross income a household anticipates it will receive for the 12 month certification period. All household members age 18 and older, persons under the age of 18 who are treated as adults because they are the head of household, or co-head/spouse, and unearned income of minor children must be included in order to establish annual income. For each household member list their income by HH Mbr # from Part II above.

Column ( A ) Enter the annual amount of wages, salaries, tips, commisions, bonuses, and other income from employment; distributed profits and/or net income from a business.
Column ( B ) Enter the annual amount of Social Security, Supplemental Security Income, pensions, military retirement, etc.
Column ( C ) Enter the annual amount of income received from public assistance (i.e., TANF, general assistance, disability, etc.)
Column ( D ) Enter the annual amount of alimony, child support, unemployment benefits, or any other income regularly received by the household.
Column (E)  Enter the anticipated annual income from assets (i.e. savings account balance multiplied by the annual interest. Possible types of assets include, but are not limited to: checking accounts, savings accounts, cash on hand, money market accounts, certificates of deposit, stocks, bonds, 401(k) and real estate.

Part IV - Demographics

Providing one's race and ethnicity is an optional disclosure for tenants. Declining to provide demographic information will not affect your eligibility for the Low Income Housing Tax Credit program. Demographic information is being tracked for information purposes only.

Race - The five racial categories to choose from are defined below: You should check as many as apply to you.

American Indian or Alaska Native  A person having origins in any of the original peoples of North and South America (including Central America), and who maintain tribal affiliation or community attachment.

Asian  A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.

Black or African American  A person having origins in any of the black racial groups of Africa.

Native Hawaiian or Pacific Islander  A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.

White  A person having origins in any of the original peoples of Europe, the Middle East or North Africa.

Ethnicity - The two ethnic categories you should choose from are defined below. You should check one of the two categories.

Hispanic or Latino  A person of Cuban, Mexican, Puerto Rican, or South or Central America, or other Spanish culture or origin, regardless of race. The term "Spanish origin" can be used in addition to "Hispanic" or "Latino."

Not Hispanic or Latino  A person not of Cuban, Mexican, Puerto Rican, South or Central America, or other Spanish culture or origin, regardless of race.

HOUSEHOLD CERTIFICATION AND SIGNATURES

After all income and assets have been reported for all household members age 18 and older, and persons under the age of 18 who are treated as adults because they are the head of household, or co-head/spouse must sign and date the Self Tenant Income Certification.
Self Certification

Effective Date
Enter the date the recertification is effective.

Official Use Only Box

Move-in Date
Enter the date the tenant had taken occupancy of the unit.

Move-out Date
Enter the date the tenant vacated the unit.

Unit Transfer
Enter the unit number tenant transferred from.

Rent Change Date
Enter the date rent will change other than at time of certification.

Tenant Paid Rent
Enter the amount the tenant pays toward rent (not including rent assistance payments such as Section 8.)

Mandatory Charges
Enter the amount of non-optional charges, such as mandatory garage rent, storage lockers, charges for services provided by the development, etc.

Rent Subsidy
Enter the amount of rent assistance, if any.

Utility Allowance
Enter the utility allowance. If the owner pays all utilities, enter zero.

Gross Rent for Unit
Enter the total of Tenant Paid Rent plus Utility Allowance and other non-optional charges.

Household meets rent restriction
Check the appropriate rent restriction that the unit meets according to what is required by the set-aside(s) for the project.

Household meet income restriction
Check the appropriate income restriction that the unit meets according to what is required by the set-aside(s) for the project.

Household income at Move-in
Enter the original total household's income from the time of move-in.

Student Status - If all household members are full time* students, check "yes". If at least one household member is not a full time student, check "no".

If "yes" is checked, the appropriate exemption must be listed in the box to the right. If none of the exemptions apply, the household is ineligible to rent the unit.

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

SIGNATURE OF OWNER/REPRESENTATIVE

It is the responsibility of the owner or the owner's representative to sign and date this document immediately following execution by the resident(s).

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.