

Each attendee will receive a course manual and an electronic copy of their certificate of attendance!

## “Managing LIHTC Compliance”

### Agenda

#### First Day (8:30am – 5:00pm)

##### Property Compliance

- Introduction and Brief Overview
- The importance of “Learning to Fish”
- What are Tax Credits?
- “The Players”
- Details you must know about your development
- How Credits are calculated
- 8609 Terms -Eligible and Qualified Basis, Applicable Fraction and Credit Percentages
- Income and Rent Limits
- Milestones in the Life of a Property
- Unique Aspects of LIHTC Acquisition/Rehab
- Other Key Requirements-
  - Keeping the Next Available Unit and Vacant Unit Rules Straight
- Fair Housing
- Combining LIHTC with Other Programs

#### Second Day (8:30am – 5:00pm)

##### Certifying Households

- Preview of Certification Steps
- Interview and Applications
- Determining Household Size
- Student Status
- Acceptable Verification Methods
- Anticipation of Annual Income
- Income from Assets
  - Asset Types and their Income
  - Imputing Asset Income
  - Assets “Disposed Of”
- Completing the TIC
- Completing the Move-in
- Recertification
- Monitoring Requirements (“Enjoying” State visits)
- Updates –Recent IRS developments
- Q & A

#### Third Day Optional HCCP Exam

(8:30am – 10:45am) Prep Review

(11:00am – 1:30pm) HCCP Exam (approximate time)

2 ½ hours are allowed to complete the exam

**Milwaukee, WI**  
(Tuesday-Thursday)  
**January 29-31, 2019**

**Optional HCCP Exam**  
**Housing Credit Certified Professional Exam**  
This is the first step in earning your designation with the National Association of Home Builders  
For more information visit: [www.nahb.org](http://www.nahb.org)

**ZEFFERT & ASSOCIATES**

### Additional Services



**UPCS, CNAs, 504 Inspections**

Inspections Department 314-336-4869



**Energy Audits and HUD Modules**

Utility Allowance Department 314-336-4862



**Electronic and On-site File Reviews**

Compliance Department 314-336-4836

### Training Location

Holiday INN Express  
Milwaukee Airport  
1400 W. Zelma’s Court  
Milwaukee, WI 53221

### Need a place to stay?

We recommend staying at the training location hotel:

Holiday Inn Express  
Milwaukee Airport  
1400 W. Zelma’s Court  
Milwaukee, WI 53221  
414-563-4000



**Need a private training or eLearning courses?**

Get more information by calling the Training Department  
314-336-4853

**Visit our website for more information**  
[www.zeffert.com](http://www.zeffert.com)

Snacks and refreshments will be provided each day. Lunch is on your own

**Please visit our website to register online or obtain the Registration Form - [www.zeffert.com](http://www.zeffert.com)**

Email completed registration form to [training@zeffert.com](mailto:training@zeffert.com) – Limited Seating!