HUD LIHTC Database Data Collection Form

OMB Approval No. XXXX-XXXX (Exp. X/XX/XXXX)

State:____________________ Allocating Agency Name: _________________________________

Project Identifying Number (if any):______________________________________

Project Name: ____

Project Address: ____
(NUMBER) (STREET)

__________________________ ________________ __________
(CITY) (STATE) (ZIP)

Owner/Owner's Representative: ____
(FIRST NAME) (LAST NAME)

____
(COMPANY NAME)

____
(NUMBER) (STREET)

__________________________ ________________ __________
(CITY) (STATE) (ZIP)

____
(AREA CODE AND TELEPHONE NUMBER)

Annual Amount of Tax Credits Allocated: $

Number of *Total* Units: ____________

Number of Total Units *by Size*: ______ ______ ______ ______ ______ = ______
OBR **1BR** **2BR** **3BR** **4+BR** **Total**

Number of *Low Income* Units: __________

What is the elected rent/income ceiling for Low Income Units in this Project? 50% AMGI ☐; 60% AMGI ☐

Are any units set aside to have rents below the elected rent/income ceiling? Yes ☐; No ☐
If "Yes," how many units __________

Year Placed In Service: __________

Year Project Received Allocation or Bond Issued: ___

Type *(check all that apply)*:
☐ New Construction
☐ Rehab (with or without acquisition)

Credit Percentage *(check one)*:
☐ 9% (70% present value)
☐ 4% (30% present value)
☐ Both

Does this LIHTC project:	**Yes**	**No**
Have a non-profit sponsor?	☐	☐
Have increased basis due to qualified census tract/difficult development area?	☐	☐
Have tax-exempt bond financing?	☐	☐
Have a Rural Housing Service (FmHA) Section 515 loan?	☐	☐
Have HOME Investment Partnership Program (HOME) funds?	☐	☐
If yes, Amount of HOME Funds: $		
Have Community Development Block Grant (CDBG) funds?	☐	☐
If yes, Amount of CDBG Funds: $____________________		
Have an FHA loan?	☐	☐
If yes, FHA Loan #: ________________		
Form part of a HOPE VI development?	☐	☐
If yes, Amount of HOPE VI Funds: $		
Have a federal or state project-based rental assistance contract?	☐	☐
Target a specific population? (If yes, check all that apply)	☐	☐

☐ Families ☐ Elderly ☐ Disabled ☐ Homeless ☐ Other ____________

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OMB Approval No. XXXX-XXXX (Exp. X/XX/XXXX)

Instructions

State: *Enter the Postal Service two-character abbreviation for your state.*

Project Identifying Number: *Enter the number or code sequence that your agency uses to identify properties. This should be an identifier that will permit future identification of this project.*

Project Name: *Enter the name of the project, if one exists. Example: Westside Terrace Apartments. Do not enter a partnership name (e.g., Venture Limited II).*

Project Address: *Enter the complete address of property, including address number and street name, city, state, and (if available) zip code. If the project has multiple addresses (e.g., 52-58 Garden Street), please provide this information in the space provided or on a separate list specifying project identifying number. Do not enter P.O. box.*

Owner's Contact Name, Address and Phone Number: *Enter the name, address and phone number of the owner or owner's contact person. This will often be a representative of the general partner. This information will be used for future mail or telephone contacts regarding the development. As such, we need an individual and company name and address as opposed to the partnership name.*

Annual Amount of Tax Credits Allocated: *Enter total dollar amount of federal tax credits that may be claimed by owners of this project each year.*

Number of Total Units: *Enter total number of units in project, summing across buildings if needed.*

Number of Total Units by Size: *Enter number of units in project (summing across buildings if necessary) that have 0, 1, 2, 3, or 4 or more bedrooms. Make sure units sum to total number of units in project.*

Number of Low Income Units: *Enter number of units in project (summing across buildings if necessary) that were qualified to receive Low Income Housing Tax Credits when building(s) was/were placed in service.*

Elected Rent/Income Ceiling: *This item indicates whether the project qualifies for tax credits with units set aside for tenants with income less than or equal to 50% of Area Median Gross Income (AMGI) or 60% of AMGI.*

Units Below Elected Rent/Income Ceiling: *Check yes if any units in the project have rent levels set below the elected maximum. If yes, enter the number of units which meet this criteria.*

Year Placed in Service: *Enter the year the project was placed in service. If this is a multiple building project, with more than one placed in service date, enter the most recent date. Placement in service date is available from IRS Form 8609, Item 5.*

Year Project Received Allocation or Bond Issued: *Enter the initial allocation year for which tax credits were awarded for the project. Allocation date is available from IRS Form 8609, Item 1a. If the project received multiple allocations, use earliest allocation year. If no allocation was required (i.e., 50 percent or greater tax-exempt bond financed) and IRS Form 8609 Item 1a is blank, enter the year the bond was issued.*

Type (New Construction or Acquisition/Rehab): *Enter the production type for which the project is receiving tax credits, i.e., a newly constructed project and/or one involving rehabilitation. If the project involves both New Construction and Rehab, check both boxes. (Construction type can be inferred from IRS Form 8609, Item 6. If box a or b is checked, the building is new construction. If box c and d or e is checked, the building is acquisition/rehab.)*

Credit Percentage: *This item indicates the type of credit provided: 9% credit (70% present value) or 4% (30% present value). Maximum applicable credit percentage allowable is available from IRS Form 8609, Item 2. The entry on the 8609 is an exact percentage for the project and may include several decimal places (e.g., 8.89% or 4.2%). Please check the closest percentage -- either 9 or 4 percent. The box marked "Both" may be checked for where acquisition is covered at 4% and rehab at 9%.*

Non-profit sponsor? *Check yes if the project sponsor is a 501(c)(3) nonprofit entity. Use the same criteria for determining projects to be included in the 10 percent non-profit set aside.*

Increased Basis Due to Qualified Census Tract (QCT) or Difficult Development Area (DDA)? *Check yes if the project actually received an increase in the eligible basis due to its location in a QCT or DDA. Increased basis can be determined from IRS Form 8609, Item 3b. (Note: projects may be located in a QCT or DDA without receiving the increase.)*

Tax-exempt bond financing? *Check yes if financing was provided through tax-exempt bonds. Use of tax-exempt bonds can be determined from IRS Form 8609, Item 4, which shows percentage of basis financed from this source.*

Rural Housing Service (RHS) Section 515 loans? *Check yes if the project was financed with a Rural Housing Service Section 515 direct loan.*

HOME or CDBG funds? *Check yes if the project was developed using HOME or CDBG funds and provide the dollar amount of funds.*

FHA loan? *Check yes if the project has an FHA loan and provide the FHA loan number.*

Part of a HOPE VI development? *Check yes if project is part of a HOPE VI public housing revitalization effort and provide the dollar amount of HOPE VI funds <u>related to development or building costs only</u>.*

Federal or state project-based rental assistance contract? *Check yes if the project has a signed contract for federal or state project-based rental assistance, subsidizing rent for low-income tenants.*

Population targeting? *Check yes if the project targets a specific population, such as families, elderly, people with disabilities, homeless, or other.*

PUBLIC BURDEN STATEMENT

Public reporting burden for this collection of information is estimated to average 1 hour for each response. This includes the time for collecting, reviewing, and reporting the data. The information will be used to measure the number of units of housing financed with the Low-Income Housing Tax Credit (LIHTC) that are produced each year. The information will also be used to analyze the characteristics of these housing units, and will be released to the public. This agency (HUD) may not collect this information, and you are not required to complete this form unless it displays a currently valid OMB control number.