

**Owner Information**

Owner Name: \_\_\_\_\_  
Owner Address: \_\_\_\_\_  
Owner City, State, and Zip Code: \_\_\_\_\_  
Owner Tax Identification Number: \_\_\_\_\_

**Property Information**

Property Name: \_\_\_\_\_  
Property Address: \_\_\_\_\_  
Property City, State and Zip Code: \_\_\_\_\_

**Building Information**

Building Number: \_\_\_\_\_  
Building Address: \_\_\_\_\_  
Placed in Service Date: \_\_\_\_\_  
Total number of Units: \_\_\_\_\_  
Number of Tax Credit Units: \_\_\_\_\_  
Number of Market Rate Units: \_\_\_\_\_  
Manager's Unit: \_\_\_\_\_  
Security Unit: \_\_\_\_\_

**Question for the Management Agent to ask the Owner**

When will the owner take credits? There are two options, the year the building was placed in service or the following year.

What is the minimum set aside of the property?

20/50: \_\_\_\_\_  
40/60: \_\_\_\_\_  
Deep Targeting: \_\_\_\_\_

When does the minimum set aside have to be met? The deadline for meeting the set-aside is the last day of the first taxable year the owner claims its credits.

What is included in eligible basis? For example, if cost of garages or parking spaces, are included in eligible basis you can't charge an additional fee for the space.

What is the applicable fraction for each building? This is the lessor of the percentage of tax credit units in proportion to the total units, or the percentage of the tax credit square footage of the rentable units in proportion to total square footage of the total rentable units.

What is the maximum tax credit rent that can be charged for each unit? What is the maximum eligible tax credit income for the household size applying for the unit? Did the owner agree to special requirements designating a certain number of units be at a certain rent level or to have tenants occupy the units that are at specific income levels?

What population group are you to serve? (an example is elderly or family) This should be outlined in your Tenant Selection Plan.

What is the extended use period of the building? This is listed in the Declaration of Land Use Restrictive Covenants.

What amenities have you agreed to provide to the tenant? (example - transportation or meals).

What amenities have you agreed to provide at the property? (examples are play area, swimming pool, central air conditioning, etc.)