

Portfolio Application Checklist

Submit one complete application for the whole portfolio.

Include information on each form, and for the budget forms use rolled up totals across the properties

Attach a Cover Letter before Form 1A describing the structure and nature of the portfolio.

If a resyndication of Commission-financed bond or tax credit projects, include the following information:

- OID or TC# of Each Property
- Expiration date of bond and/or tax credit Regulatory Agreement(s)
- Proposed changes to income or special needs set-asides for the projects
- Any other changes to the current configuration of the projects

Submit the following forms per Property within the Portfolio (label each form per Property clearly)

- Form 1B Units & Square Footage
- Form 1C Unit Information by Building
- Form 2A Project Description
- Form 2B/2C/2D/2E ESDS Project Checklist
- Form 6B LIHTC Eligible Basis
- Form 6C LIHTC Calc - Submit **Eligible Basis Credit Calculation** per property if there are variations in QCT/DDA status across the portfolio.
- Form 6C LIHTC Calc - Submit a separate form 6C with one **Equity Gap Calculation** that encompasses the entire portfolio.
- Form 6D Total Development Cost Limit Calculation
- Form 7A Financing Terms
- Form 7B Historic Rehabilitation Tax Credits
- Form 8A Project Rents
- Form 8B Operating Pro Forma

Submit the following forms per Property if there are variations

- Form 3 Population Served
- Form 4 Relocation
- Form 6C LIHTC Calculation
- Form 10 Scoring Worksheet