

# Washington State Housing Finance Commission 4% Tax Credit/Bond Program Application Instructions January 2021

## Step 1: Make sure you have all application components

- **Application Checklist** – This lists all attachments that are required for the 2021 Bond/Tax Credit Application.
- **Portfolio Checklist** – A list of the additional materials required for portfolio financings (in addition to one complete application for the entire portfolio).
- **Application** – This Excel workbook contains the required forms, budgets, pro forma and other numerical parts of the application.

## Step 2: Prepare your application for submittal

- a) Organize your application materials into ONE folder per project application, and include the sponsor organization and the project name when naming your folder i.e., “Sponsor Organization – Project Name”
- b) Within your project folder, organize your application materials into sub-folders according to the Application Checklist or the visual guide below:

| Name                                     | Size   | Type                      |
|------------------------------------------|--------|---------------------------|
| TAB 1 - Project Summary                  |        | File folder               |
| TAB 2 - Project Description              |        | File folder               |
| TAB 3 - Population Served                |        | File folder               |
| TAB 4 - Relocation                       |        | File folder               |
| TAB 5 - Project Schedule                 |        | File folder               |
| TAB 6 - Development Budget               |        | File folder               |
| TAB 7 - Project Financing                |        | File folder               |
| TAB 8 - Project Operations               |        | File folder               |
| TAB 9 - Development Team                 |        | File folder               |
| TAB 10 - Bond-Tax Credit Program Scoring |        | File folder               |
| Project Name - Application               | 375 KB | Microsoft Excel Worksheet |

- c) For files contained within each of the sub-folders, clearly name each file with the project name AND the name of the document as described on the Application Checklist or the visual guide below:

| Name                               | Size  | Type                   |
|------------------------------------|-------|------------------------|
| Project name - Market Study.pdf    | 17 KB | Adobe Acrobat Document |
| Project name - Con Plan Ltr.pdf    | 17 KB | Adobe Acrobat Document |
| Project name - 10year Plan Ltr.pdf | 17 KB | Adobe Acrobat Document |

- d) Please use the following conventions for your submission:
- Do not convert Excel forms to PDF.
  - Make sure any scanned copies of paper documents are legible with reasonably sized font and, when applicable, clear signatures and dates. (Wet signatures are not required.)
  - **Notarized signatures will not be required for this application round.**
  - The project’s legal description must be submitted in MS Word format – not as a graphic, such as a jpg file.
  - Please create a folder if there are multiple files addressing a single checklist item.
  - If an item is not applicable to your project, simply do not include it; do not create placeholder files for “n/a” items.

### Step 3: Submit your application:

- a) Option #1: Send [sojung.choi@wshfc.org](mailto:sojung.choi@wshfc.org) a share link to access/download your application materials from a cloud storage service (like Dropbox) by the application deadline.
- b) Option #2: Email [sojung.choi@wshfc.org](mailto:sojung.choi@wshfc.org) with a list of email addresses to request Dropbox folder access when you are ready to submit your application. We will provide a secure folder for you in our Dropbox account and provide access to only those email addresses provided in your request. You may then view/edit/upload files to your project folder up until the application deadline.
- You will be asked to register for a free account when you click on the access link if you don’t already have an associated account.

**Please note:** WSHFC will not be accepting applications submitted via email, or via physical media such as a flash drive or CD, or on paper, for this round.

For technical questions about submitting your application materials, email [sojung.choi@wshfc.org](mailto:sojung.choi@wshfc.org).  
For questions about application contents and file naming conventions, email [claire.petersky@wshfc.org](mailto:claire.petersky@wshfc.org).

#### Step 4: Submit your application Fee:

Applications are due electronically this year, we have two ways for project sponsors to remit their application fee. We prefer you send funds via ACH or WIRE. To use ACH/WIRE please email your request to Shukri Rodol ([shukri.rodol@wshfc.org](mailto:shukri.rodol@wshfc.org)) for instructions. To mail a check please make sure that it will arrive on or before Wednesday, January 20, 2021. The Commission mailing address is:

Washington State Housing Finance Commission  
Attn: MHCF (Bond/Tax Credit Program (4% TC))  
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