

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

“Managing LIHTC Compliance”

Billings, MT

(Tuesday - Thursday)

June 26 - 28, 2018



ZEFFERT & ASSOCIATES

www.zeffert.com

Training@zeffert.com

866-760-6000

Need a place to stay?

We recommend the training location.

Special rates will apply.

For sleeping rooms:

Call 406-656-3900

By June 1, 2018 for discounted group rate

and mention

Zeffert & Associates

Questions? Call the Training Department

1-866-760-6000 M-F

If you cannot attend this training but need affordable housing education, contact us, training@zeffert.com or view our website at www.zeffert.com

We provide online modules and webinars for the following programs:
LIHTC, HUD, HOME Funds, Rural Development, BOND and Fair Housing

Training Location:

Residence Inn Marriott
956 S 25th St West
Billings, MT 59102

Telephone Number - 406-656-3900

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

Would you like a Private or Online Training?

Get pricing or information by calling the Training Department at 1-866-760-6000

Quality – Expertise – Customer Service

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

- Prep Review (8:30am – 10:30am - approximate time)
- HCCP Exam (10:45am – 1:15pm - approximate time)
- (2 ½ hours allowed to complete the exam)

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

Seating Is Limited!

www.zeffert.com to register online or to obtain a Registration Form

Then with your completed Registration Form – fax it to: 314-336-4841 or email it to: training@zeffert.com



4 Ways to Register:

- Register and pay online at: www.zeffert.com
Fax this completed form to: (314) 336-4841
Email this form to: Training@zeffert.com
Mail this form and payment to: Zeffert & Associates
12101 Woodcrest Executive Dr
Suite 180
St. Louis, MO 63141

Questions? Call the Training Department at 1-866-760-6000

Table with 3 columns: Training choice, Ahead of the Class rate, Regular Rate. Rows include: The complete 2-day training & HCCP exam-3rd day, The complete 2-day training (no exam), The HCCP Exam and review (3rd day).

2 Training date: Is today's date 30 days prior to the training date? The special Ahead of the Class rate applies.

3 Location city:

- 4 Attendee 1 *Email
Attendee 2 *Email
Attendee 3 *Email
Attendee 4 *Email

*A valid email address is required to ensure timely receipt of important event information, including test results

5 How did you hear about this training? phone email word of mouth fax Zeffert training other (please explain):

6 Please charge \$ to: VISA MasterCard American Express Invoice me
Card # Exp. Date Sec Code#
Cardholder or Invoice name:
Billing Address:
City: State: Zip:
Phone: Fax:
Email:
Organization/Site Name: Phone:

Refund Policy: Full Refund - At least 2 months prior to the session Full Refund (less a \$50 administration fee) - at least 1 month prior to session No Refund - Less than 1 month before session. Substitute personnel or credits toward future PUBLIC Zeffert & Associates trainings are allowed for up to 1 year.

7 Signature of authorized payer (student or supervisor who approves training expenditures)

I have read and agree to be bound by the terms and conditions set forth on this registration form. In addition, I am authorized by the organization listed above to incur these charges on its behalf.

Signature Date