

# ZEFFERT & ASSOCIATES

## Mastering LIHTC Compliance

With optional HCCP online exam

*In Partnership with  
Montana Housing*

*April 4-6, 2023*

*Fairmont Hot Springs Resort  
1500 Fairmont Road  
Fairmont, MT 59711*

### AGENDA

Daily check-in: 8:15 am - 8:30 am

One hour lunch provided, lunch is on your own

#### Day One: 8:30 am – 5:00 pm

- Introduction of property compliance
- Defining Tax Credits
- Development details
- Credit calculation
- The 8609, eligible, and qualified basis
- Set asides, including average income
- Applicable fraction and credit percentages
- Income and rent limits
- Property acquisitions and rehabs
- The vacant and next available unit rules
- Fair Housing
- Combining LIHTC with other programs

#### Day Two: 8:30 am – 5:00 pm

- Qualifying Households
- Interviews and applications
- Determining household size
- Student status
- Verification methods
- Annual and asset income
- Disposed of assets
- Completing the TIC
- Completing a Move-in
- Re-certification

#### HCCP Exam 8:30 am – 1:30 pm

- 8:30 AM - 10:45 AM – HCCP Review
- 11 AM - 1:30 PM – HCCP Exam (approx. time)
- 2 ½ hours provided to take the exam



**Registration coming soon!**



**MONTANA  
HOUSING**

Questions? Contact Mandi Lewis  
Training Department Manager  
314-915-6907 | [mlewis@zeffert.com](mailto:mlewis@zeffert.com)

