



## INSTRUCTIONS FOR COMPLETING TENANT INCOME CERTIFICATION

*This form is to be completed by the owner or an authorized representative.*

### PART I - Development Data

Check the appropriate box for Initial Certification (move-in), Recertification (annual recertification), or other. If other, designate the purpose of the recertification (i.e., a unit transfer, a change in household composition, or other state-required recertification).

Move-In Date	Enter the date the tenant has or will take occupancy of the unit.
Effective Date	Enter the effective date of the certification. For move-in, this should be the move-in date. For annual recertification, this effective date should be no later than one year from the effective date of the previous (re)certification.
Property Name	Enter the name of the development.
County	Enter the county (or equivalent) in which the building is located.
BIN#	Enter the Building Identification Number (BIN) assigned to the Building (from IRS Form 8609).
PISD	Enter the Placed in Service Date of the BIN (from IRS Form 8609).
Address	Enter the address of the building.
Unit Number	Enter the unit number.
# Bedrooms	Enter the number of bedrooms in the unit.
Sq. Ftge	Enter the unit's square footage.

### PART II - Household Composition

List all occupants of the unit. State each household member's relationship to the head of household by using one of the following coded definitions:

H - Head of Household	S - Spouse
A - Adult co-tenant	O - Other family member
C - Child	F - Foster children/adult(s)
L - Live-in caretaker	N - None of the above

Enter the date of birth, student status, last four (4) digits of the social security number or alien registration number for each occupant. Enter the household member's race and ethnicity by using one of the following coded definitions:

<b>RACE</b>	<b>Ethnicity</b>
1 - White	1 - Hispanic/Latino
2 - Black/African American	2 - Not Hispanic/Latino
3 - American Indian/Alaska Native	3 - Tenant did not respond
4 - Asian	
5 - Native Hawaiian/Other Pacific Islander	
6 - Other	
8 - Tenant did not respond	

Enter "yes" if household member is disabled according to the Fair Housing definition for disabled, otherwise enter "no".

The housing credit agency administering its low-income housing credit program must, to the best of its ability, provide this disability status information, pursuant to 42 U.S.C. 1437z-8. However, it is the tenant's voluntary choice whether to provide such information, and questions to the tenant requesting the information must so state. If the tenant declines to provide the information, the housing credit agency shall use its best efforts to provide the information, such as noting the appearance of a physical disability that is readily apparent and obvious, or by relying on a past year's information. For purposes of gathering this information, no questions with respect to the nature or severity of the disability are appropriate.

*If there are more than 7 occupants, use an additional sheet of paper to list the remaining household members and attach it to the certification.*

### PART III - Annual Income

**See HUD Handbook 4350.3 for complete instructions on verifying and calculating income, including acceptable forms of verification.**

From the third party verification forms obtained from each income source, enter the gross amount anticipated to be received for the twelve months from the effective date of the (re)certification. Complete a separate line for each income-earning member and each income source, do not lump income sources. List the respective household member number from Part II.

Column (A)	Enter the annual amount of wages, salaries, tips, commissions, bonuses, and other income from employment: distributed profits and/or net income from business.
Column (B)	Enter the annual amount of Social Security, Supplemental Security Income, pensions, military retirement, etc.
Column (C)	Enter the annual amount of income received from public assistance (i.e., TANF, general assistance, disability, etc.).
Column (D)	Enter the annual amount of alimony, child support, unemployment benefits, or any other income regularly received by the household.
Row (E)	Add the totals from columns (A) through (D) above. Enter this amount.

## PART IV - Income from Assets

See HUD Handbook 4350.3 for complete instructions on verifying and calculating income, including acceptable forms of verification.

From the third party verification forms obtained from each asset source, list the gross amount anticipated to be received during the twelve-months from the effective date of the certification. List the respective household member number from Part II and complete a separate line for each income-earning member and each income source; do not lump income sources. List the respective household member from Part II.

Column (F)	List the type of asset (i.e., checking account, savings account, etc.).
Column (G)	Enter C (for current) if the family currently owns or holds the asset, or I (for Imputed) if the family has disposed of the asset for less than fair market value within two years of the effective date of (re)certification.
Column (H)	Enter the cash value of the respective asset.
Column (I)	Enter the anticipated annual income from the asset (i.e. savings account balance multiplied by the annual interest rate).
TOTALS	Add the total of Column (H) and Column (I), respectively.

If the total in Column (H) is greater than \$5,000, you must do an imputed calculation of asset income. Enter the Total Cash Value, multiply by 0.06% and enter the amount in (J) Imputed Income.

Row (K)	Enter the greater of the total in Column (I) or (J).
Row (L)	Total Annual Household Income From all Sources: Add (E) and (K) and enter the total.

## PART V - Determination of Income Eligibility

Total Annual Household Income	Enter the number from item (L) from all Sources.
Current Income Limit per Family	Enter the Current Allowable Move-In Income Limit for the household size ( <i>See chart published annually</i> ).
Household Income at Move-In	Enter the household income amount at move-in on all initial certifications and re-certifications.
Household Size at Move-In	Enter the number of household members at move-in on all initial certifications and re-certifications.
Household Meets Income Restriction	Check the appropriate box for the income restriction that the household meets according to what is required by the set-aside (S) for the project.
Current Income Limit x 140%	For re-certifications only. Multiply the current Maximum Move-In Income Limit by 140% and enter the total. Below, indicate whether the household income exceeds that total. If the Gross Annual Income at re-certification is greater than 140% of the current income limit, then the available unit rule must be followed.

## PART VI - Rent

Tenant Paid Rent	Enter the amount the tenant pays toward rent (not including rent assistance payments such as Section 8).
Rent Assistance Source	Enter both the Federal and Non-Federal amount of rent assistance, if any. Be sure to enter separate amounts for each source. Enter the source of the Federal rent assistance.
Utility Allowance	Enter the utility allowance. If the owner pays all utilities, enter zero.
Other non-optional charges	Enter the amount of <u>non-optional</u> charges, such as mandatory garage rent, storage lockers, charges for services provided by the development, etc.
Gross Rent for Unit	Enter the total of Tenant Paid Rent plus Utility Allowance and other non-optional charges.
Maximum Rent Limit for this unit	Enter the maximum allowable gross rent for the unit.
Unit Meets Rent Restriction at	Check the appropriate rent restriction that the unit meets according to what is required by the set-aside(s) for the project.

## PART VII - Student Status

If all household members are full time\* students, check "yes". If at least one household member is not a full time student, check "no". If "yes" is checked, the appropriate exemption must be listed in the box to the right. If none of the exceptions apply, the household is ineligible to rent the unit.

\*The educational institution attended by the student determines "full time" or "part time" status.

## PART VIII - Program Type

Mark the program(s) for which the household's unit will be counted toward the property's occupancy requirements. Under each program marked, indicate the household's income status as established by this certification/re-certification. If the property does not participate in the HOME, Tax-Exempt Bond, Affordable Housing Disposition, or other housing program(s), leave those sections blank.

Tax Credit	See Part V above.
HOME	If the property participated in the HOME program and the unit this household will occupy will count towards the HOME program set-aside, mark the appropriate box indicating the household's designation.
Tax-Exempt Bond	If the property participates in the Tax-Exempt Bond program and this household's unit will count towards the set-aside requirements, mark the appropriate box indicating the household's designation.
AHDP	If the property participates in the Affordable Housing Disposition Program (AHDP) and this household's unit will count towards the set-aside requirements, mark the appropriate box indicating the household's designation.
Other	If the property participates in any other affordable housing program (i.e. Housing Trust Fund (HTF)), complete the information as appropriate.

## HOUSEHOLD CERTIFICATION AND SIGNATURES

After all verifications of income and/or assets have been received and calculated, each household member age 18 or older must sign and date the Tenant Income Certification. For move-in, it is recommended that the Tenant Income Certification be signed no earlier than 5 days prior to the effective date of the certification.

It is the responsibility of the owner or the owner's representative to sign and date this document immediately following execution by the resident(s).