



## CALIFORNIA TAX CREDIT ALLOCATION COMMITTEE

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### MEMBERS

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TIA BOATMAN PATTERSON  
Executive Director of CalHFA

DATE: January 14, 2021  
TO: Low Income Housing Tax Credit Project Management Companies  
FROM: California Tax Credit Allocation Committee – Compliance Section  
RE: Annual Owners Certification Package for Reporting Year 2020 – Part I

**EXECUTIVE DIRECTOR**  
JUDITH BLACKWELL

The California Tax Credit Allocation Committee (CTCAC) is pleased to announce that the Annual Owners Certification (AOC) Package is now available on its Website at: <http://www.treasurer.ca.gov/ctcac/compliance/aoc/index.asp>.

For the 2020 reporting, the Annual Owners Certification (AOC) package will continue to consist of four reports: Annual Owners Certification (AOC) form, Project Ownership Profile (POP) form, Annual Operating Expense (AOE) form and the Lender Profile (LP) form. One submission of the Annual Owners Certification Package per property is required for properties in the initial federal compliance period, as well as those in the extended-use period. The package will be divided into two parts, with two distinct submission dates, as follows:

### **The 2020 AOC package Part I - Due April 5, 2021:**

- AOC form (email via PDF, one form per project),
- POP form (email via *Excel*, one project per workbook)
  
- Part I Submission
  1. Owners of projects:
    - **Email the AOC form(s)** (Annual Owners Certification Form) to [TCAC@treasurer.ca.gov](mailto:TCAC@treasurer.ca.gov)
      - i. **The AOC email MUST HAVE:**
        1. **Contact name of person completing form(s)**
        2. **Subject title of email: 2020 AOC(s) – Part I**
      - ii. **The AOC form MUST HAVE:**
        1. **Project name from AOC drop down list**
        2. **Notary**
  
    - **Email the POP form(s)** (Project Ownership Profile) to [TCAC@treasurer.ca.gov](mailto:TCAC@treasurer.ca.gov)
      - i. **The POP form MUST:**
        1. **BE FILLED OUT COMPLETELY – \*BLANK FIELDS WILL CAUSE REJECTION OF ENTIRE POP\***
        2. **BE IN THE FORM OF AN EXCEL FILE. POP's sent in the form of a PDF or any form other than Excel will be immediately rejected.**
        3. **Have a subject title of: 2020 POP(s)**

**The 2020 AOC Package Part II – Due on June 7, 2021**

- Part II Submission
  2. The AOE and LP forms will be available online on or after April 5, 2021

If you have any questions or problems downloading or submitting the AOC package Part I, please contact Julio Villanueva at [Julio.Villanueva@treasurer.ca.gov](mailto:Julio.Villanueva@treasurer.ca.gov) / (916) 653-4277.

Any questions downloading or submitting the AOC package Part II, please contact Stephen Bellotti at [Stephen.Bellotti@treasurer.ca.gov](mailto:Stephen.Bellotti@treasurer.ca.gov) / (916) 651-0409.