

Checklist for Qualified Contract Processing

Project Name	
Taxpayer Name	
Taxpayer Contact Information	

	Submitted		
	<u>Yes</u>	<u>No</u>	<u>N/A</u>
I. Executed cover letter [draft]	_____	_____	_____
(a) Certification of Qualified Contract Amount as of Submission Date and dated end of 12 month period following Submission Date	_____	_____	_____
(b) Qualified Contract Delivery Deadline	_____	_____	_____
(c) Mandatory Adjustment	_____	_____	_____
II. Required Third Party Reports			
(a) Physical Needs Assessment	_____	_____	_____
(b) Appraisal	_____	_____	_____
(c) Rent Comparability Study	_____	_____	_____
(d) Phase I Environmental [Phase II only if necessary based upon Phase I findings]	_____	_____	_____
III. AMEC Model	_____	_____	_____
IV. Original Deposit	_____	_____	_____
V. Required Certifications			
• No IRS Audit, investigation or inquiry pending	_____	_____	_____
• Property in compliance with §42 requirement	_____	_____	_____
• Taxpayer's CPA calculation of Qualified Contract Processing	_____	_____	_____

	Submitted		
	<u>Yes</u>	<u>No</u>	<u>N/A</u>
VI. All 8609's with Part II's	_____	_____	_____
VII. All audited financial statements for project	_____	_____	_____
VIII. Annual Taxpayer Tax Return	_____	_____	_____
IX. Loan Documents for all secured debt	_____	_____	_____
X. Taxpayer organization documents	_____	_____	_____
XI. Consent of Taxpayer partners or members to seek Qualified Contract	_____	_____	_____
XII. Bona fide offers to purchase within one year of Submission Date	_____	_____	_____
XIII. Title Report	_____	_____	_____

DRAFT