

HOUSING TAX CREDIT  
**APPLICATION CHECKLIST**

Development Name: \_\_\_\_\_

Ownership Entity: \_\_\_\_\_

Instructions:

- 1 Applications must be submitted via web only.
- 2 All required documents in the application checklist must be uploaded with the online application.
- 3 Applicants will not be required to print and submit a hard copy of the online application
- 4 Supporting documents must be properly executed.
- 5 The application fee must be submitted in the form of a certified bank check or money order payable to MHC and attached to the Transmittal.
- 6 The application fee must be received by 4pm CST of the cycle closing date at the office of MHC:

**Mississippi Home Corporation**  
**Att: Tax Credits Allocations**  
**735 Riverside Drive**  
**Jackson, MS 39202**

**UPLOADED DOCUMENTS**

**I. APPLICATION DOCUMENTS**

- 1 Application Checklist (*Attachment 1*)
- 2 Copy Application Fee with Check Transmittal (*Attachment 15*)
- 3 Applicant Rating Form - Form SC-1
- 4 Compliance Verification Letter (*see Section GPAG 1.3(2) of the QAP*)
- 5 Financial Feasibility Forms
  - Sources and Uses Statement - Form FF-1
  - Maximum Construction Cost (MCC) - Form FF-2 (*include MHC's approval, if applicable*)
  - Maximum Administrative Expense (MAE) Form FF-3 (*include justification for expenses, if applicable*)
  - Maximum Developer Profit Percentage (MDPP) - Form FF-4
  - Debt Service Underwriting Criteria - Form FF-5
  - Financial Feasibility Certification - Form FF-6
- 6 Statement of Application & Certification

**II. GENERAL REQUIRED DOCUMENTS (*Addendum C*)**

- 1 Development Narrative
- 2 Development Plan of Action
- 3 Original Initial Site Assessment Form (*Attachment 2*)with Photos of Site
- 4 Organizational Documents
  - (a) Organization Chart
  - (b) Formation Documents for the Ownership Entity and General Partner Entity
  - (c) Certificate of Good Standing for the Ownership Entity and General Partner Entity
- 5 Construction Documents
  - (a) Construction Financing Letter
  - (b) Construction Contract
  - (c) Construction Certification Form (*Attachment 3*)
- 6 Letter of Conformance
- 7 Identity of Interest Statement (*Attachment 12*)
- 8 Maximum Credit Award Certification (*Attachment 13*)
- 9 Utility Allowance
- 10 Location Maps
- 11 Architect/Engineer Confirmation for Cable TV and Internet Access

- 12 Public Housing Waiting List Certification

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### III. OTHER REQUIRED DOCUMENTS *(Addendum C)*

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- 1 Nonprofit Entities *(if applicable)*
- (a) IRS documentation of IRC § 501(c)3 or 501(c)4 status
  - (b) Articles of Incorporation and Bylaws and all relative amendments
  - (c) Evidence that it or its officers or members have experience in developing or operating low-income housing
  - (d) The names of board members of the non-profit
  - (e) Attorney Opinion Letter
- 2 Acquisition/Rehabilitation Developments *(if applicable)*
- (a) Physical Needs Assessment certified by a licensed Architect or Engineer *(Attachment 4)*
  - (b) Appraisal (documenting land value and improvements) from a certified appraiser
  - (c) Photos of the site
  - (d) A title opinion from an attorney documenting property ownership for the last ten years OR an approved waiver
  - (e) Relocation Plan *(if applicable)*
- 3 New Construction Developments *(if applicable)*
- (a) Description of Materials *(Attachment 5)*
  - (b) Appraisal (documenting land value) from a certified appraiser
  - (c) Plans/Drawings from a licensed architect or engineer
- 4 Tax Exempt Bond Financed Developments *(if applicable)*
- (a) An opinion letter from a Certified Public Accountant certifying that fifty percent (50%) or greater of aggregate basis will be financed by tax-exempt bonds.

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### IV. THRESHOLD DOCUMENTS

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- 1 COMMUNITY NOTIFICATION
- (a) Local Government Notification Form (Form TR-1)
  - (b) Proof of Publication of the Notice of Intent to Apply for Housing Tax Credits
  - (c) Affidavit of Compliance with Community Notification (TR-2)
  - (d) Photo of Signage
  - (e) Written compilation of public comments *(if applicable)*
  - (f) Developer statement addressing any public concerns *(if applicable)*
- 2 SITE CONTROL  
Evidence showing the ownership entity has control of the proposed site
- 3 LOCAL ZONING AND DEVELOPMENT CONDITIONS  
Evidence of proper zoning or letter from local authorities and utility providers
- 4 MARKET STUDY
- (a) Certification of Market Study Acceptance *(Attachment 8)*
  - (b) Market Study *(see Market Study Guide)*
  - (c) Market Study Addendum (Health Care Initiative) *(if applicable)*
- 5 DEVELOPMENT FINANCING
- (a) Required Permanent Financing Documentation as outlined in Section 4.5 of the QAP
  - (b) Copies of Proposed Budgets and Cash Flow Statements with Lender and Syndicator Acknowledgment
  - (c) Letter of Intent from Syndicator/Investor *(Attachment 10)*

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### V. SELECTION CRITERIA *(Addendum A)*

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- 1 CONTRIBUTES TO A CONCERTED REVITALIZATION PLAN
- (a) Verification letter from city/county
  - (b) Relevant information from the revitalization plan *(if applicable)*
- 2 ZIP CODE CONCENTRATION  
Map from Dr. Mokry verifying property is located in a qualified zip code
- 3 HIGH OPPORTUNITY AREA  
Map from Dr. Mokry verifying property is located in a high opportunity area

- 4 NATIONAL GREEN BUILDING STANDARDS
  - (a) Letter of Intent from the Applicant
  - (b) Certification from the development's architect/engineer
  - (c) Written Proposal from an NGBC Verifier
- 5 DEVELOPMENT AMENITIES
  - (a) Copy of site layout plans/drawings or Physical Needs Assessment highlighting the amenities listed in the application
  - (b) Other Development Amenities Supporting Documentation (*as applicable*)
    - MOU for full-time or part-time Service Coordinator
    - Copy of Community Services Certification (Attachment 9) for developments providing Advanced Community Services
    - Photo of playground equipment and/or fitness center equipment
- 6 UNIT AMENITIES
  - (a) Copy of unit plans/drawings or Physical Needs Assessment highlighting the amenities listed in the application
  - (b) Copy of written policy and sample lease agreement for Smoke Free developments (*as applicable*)
- 7 DEVELOPMENT TYPE
  - New Construction Developments
    - (a) Single Family Homes  
Letter from architect stating that the development will consist of single family homes only and will have public access
    - (b) Lease Purchase Option for Tenants  
A sample copy of the lease purchase agreement and, for attached homes, a sample condominium document
    - (c) Attached Homes  
A sample copy of the condominium document
  - Acquisition/Rehabilitation Developments
    - (a) Substantial Rehabilitation Needed per Unit  
Copy of page 4 of the Physical Needs Assessment
    - (b) Historic Developments  
Documentation as outlined in Scoring Item #8(b) under Selection Criteria (Addendum A)
    - (c) Preservation  
Documentation for the type of Preservation selected under Scoring Item #8(c) under Selection Criteria (Addendum A)
- 8 DEEPER TARGETING
  - Statement electing to set aside at least 15% of the units for persons at or below 30% of the AMI
- 9 SPECIAL NEEDS HOUSING
  - (a) Statement from Applicant identifying which Special Need population the development will target
  - (b) Copy of the page of the market study that addresses the specialized need
  - (c) Marketing Plan
  - (d) Comprehensive Service Plan
  - (e) Other supporting documentation based on the Special Needs selected:
    - Statement that specifies the percentage of units to be set aside for Special Needs.
    - Statement that specifies the Elderly age group that the development will target. (*Elderly Developments only*)
    - Letters of Support from the nearest Veterans Administration Hospital/Clinic (*Veterans only*)
- 10 DEVELOPMENT EXPERIENCE
  - Original executed Development Experience Form (Attachment 6 )
- 11 MANAGEMENT EXPERIENCE
  - (a) Management Agreement or Letter of Intent from Management Entity
  - (a) Original executed Management Experience Form (Attachment 7)
  - (b) HTC Certificate(s) (*if applicable*)
- 12 MAXIMUM CONSTRUCTION COST LIMITS
  - Copy of Maximum Construction Cost Form (FF-2)

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**VI. OTHER ATTACHMENTS**

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