**INSTRUCTIONS FOR COMPLETING ATTACHMENT L-3 TENANT INCOME CERTIFICATION**

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

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, etc.).

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| --- | --- |
| 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. |
| Next Recert Date | Enter the effective date of the next recertification. For annual recertification, this effective date should be no later than one year from the effective date of the previous (re)certification. |
| Move-in Date | Enter the date the tenant has taken occupancy of the unit. |
| *\*For new move-ins/initial certifications, the above information should not be completed until the initial lease is signed and the household takes occupancy of the unit.* | |

**Part I - Development Data**

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| --- | --- |
| Property Name | Enter the name of the development. |
| Building ID# (BIN) – LIHTC projects only | Enter the LIHTC Building Identification number for this address, if applicable, after the 8609 is filed. |
| Address | Enter the address of the building. |
| Unit Number | Enter the unit number. |
| # Bedrooms | Enter the number of bedrooms in the unit. |

**Part II - Household Composition**

List all household members 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 | O | Other family member |
| S | Spouse | F | Foster child or foster adult |
| A | Adult co-tenant | L | Live-in aide |
| C | Child |

Enter the race, ethnicity, disability status, date of birth, F/T student status , and Last 4 digits of Social Security #/Alien registration #, or Individual Taxpayer ID# for each household member.

*If there are more than 10 household members, use an additional page 1 of Attachment L to list the remaining household members and attach it to the certification.*

**Part III – Gross Annual Income**

From the 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. List the respective household member number from Part II.

|  |  |
| --- | --- |
| Employment or Wages  Column (A) | Enter the annual amount of wages, salaries, tips, commissions, bonuses, and other income from employment; distributed profits and/or net income from a business. |
| Soc. Security / Pensions  Column (B) | Enter the annual amount of Social Security, Supplemental Security Income, pensions, military retirement, etc. |
| Public Assistance  Column (C) | Enter the annual amount of income received from public assistance (i.e., TANF, general assistance, disability, etc.). |
| Other Income  Column (D) | Enter the annual amount of alimony, child support, unemployment benefits, or any other income regularly received by the household. |
| Total Income  Row (E) | Combine the totals from Columns (A) through (D), to determine (E), Total Income. |

**Part IV - Income from Assets**

From the verification forms or self-certification obtained for 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 member.

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| --- | --- |
| Type of Asset  Column (F) | List the type of asset (i.e., checking account, savings account, etc.) and the last 4 digits of the account (if applicable). |
| C/D  Column (G) | Enter C (for current, if the family currently owns or holds the asset), or D (for disposed, if the family has disposed of the asset for less than fair market value within two years of the effective date of (re)certification). |
| Cash Value of Asset  Column (H) | Enter the cash value of the respective asset. The cash value should be entered as follows:   * If total combined cash value is less than or equal to the current HUD-published asset threshold, then for Non-necessary Personal Property (NNPP) list the cash value of each asset as $0. However, annual income from the asset must still be listed in Column J even if value is $0 in Column H. * If total combined cash value is greater than the current HUD-published asset threshold, then for Non-necessary Personal Property (NNPP) list the actual cash value of each asset. |
| A/I  Column (I) | Enter A if asset income for that asset is actual income or I if asset income for that asset is imputed. |
| Annual Income from Asset  Row (J) | Enter the anticipated annual income from the asset (i.e., savings account balance multiplied by the annual interest rate). If actual income can be determined, use actual income. If actual income cannot be determined AND net family assets exceed the current HUD-published asset threshold, then calculate the imputed income for that asset instead using the current HUD-published passbook savings rate. |
| Total Income From Assets  Row (K) | Combine the totals from Column (J) to determine (K) Total Income from Assets. |
| Total Annual Household Income  Row (L) | Combine the totals from (E) and (K) to determine (L) Total Annual Household Income. |

**Part V – Determination of Income Eligibility**

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| --- | --- |
| Total Annual Household Income from all Sources | Enter the amount from item (L), Total Annual Household Income from All Sources. |
| Current Income Limit per Family Size | Enter the Current Move-in Income Limit for the household size. |
| Household income at move-in | Enter the household income at move-in *(include on the initial certification and recertifications)*. |
| Household size at move-in | Enter the number of household members from the move-in certification. |
| **For Recertification Only** | Enter the current appropriate income limit based on household size (140% for Mixed-income projects and 170% for Deep-Rent Skewed projects) and indicate if the household income exceeds the applicable income limit at recertification. |

**Part VI - Rent**

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| --- | --- |
| Tenant Paid Rent | Enter the amount the tenant pays toward rent (not including rent assistance payments such as Section 8). |
| Rent Assistance | Enter the amount of rent assistance (if any). |
| Utility Allowance | Enter the utility allowance. If the owner pays all utilities, enter zero. |
| Other non-optional charges | Enter the amount of non-optional 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 plus other non-optional charges. |
| Maximum Gross Rent Limit for this unit | Enter the maximum allowable gross rent for the unit. |
| Rent Level (in AMI) | Check the appropriate rent restriction that the unit meets. |

**Part VII – Student Status**

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| --- | --- |
| 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, student explanation | If “yes” is checked, the appropriate exemption must be listed in the box to the right. If none of the exemptions apply, the household is ineligible to rent the rent. |

**Part VIII – Program Type**

Mark the program(s) listed below (A. through E.) for which this 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/recertification.

**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.

**SIGNATURE OF OWNER/REPRESENTATIVE**

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). The responsibility of documenting and determining eligibility (including completing and signing the Tenant Income Certification form) and ensuring such documentation is kept in the tenant file is extremely important and should be conducted by someone well trained in compliance.