

Self-Certification of Annual Income

Purpose: This form may be used for 100% Low Income Tax Credit Properties for the third year and beyond. Initial certification and third-party certification for the second year of occupancy is required; the third year you may use this form.

NOTE: Properties approved for Post-Year 15 monitoring and those with the IRS Recertification Waiver may use this form for all of their recertifications.

NOTE: Back-up documentation is not required by WSHFC but may be required by other funders.

General Information:

This form is to be effective on the lease anniversary date (or initial certification anniversary for in-place residents in an acquisition/rehab) and must be completed within 120 days prior to that date by every household. Remember that a “Head of Household”(HOH) can also be an emancipated minor. There is a “management use only” portion at the end of the form; otherwise, households must complete the form themselves.

Specific Instructions:

1. Enter property name and unit number (management staff may fill this in).
2. Print head of household name (HOH).
3. Print number of persons in household.
4. Print name of HOH.
5. Print HOH date of birth.
6. Check “Yes” or “No” box in response to student question.
7. Print names of additional household members on additional lines.
8. Enter dates of birth for additional household members.
9. Check “Yes” or “No” boxes in response to student question for each additional household member.
10. Print name of HOH.
11. Enter total gross income received by HOH, including assets (see **NOTES** on second page of form). If the HOH has more than one income source, add income from all of his/her individual sources together and enter total. Do not include any income of other household members on this line.
12. Initials of HOH go on this line.
13. Print names of all additional household members on additional lines.

Head of Household fills in items 2 – 17

**Management
Completes items
18 - 25**

14. Enter total gross income received by additional household members, including assets and unearned income of minors, on additional lines.
15. Initials of additional adult household members (18 or older or emancipated minor) go on additional lines, even if the adult receives no income.
16. Signature of HOH goes on this line; HOH must also print name and date where indicated.
17. Signatures of additional adult household members (18 or older or emancipated minor) go on the additional lines; additional household members must also print their name and date where indicated.
18. Enter original move-in date.
19. Enter effective date of recertification; this date should be the anniversary date of the initial certification.
20. Enter total gross income amount for entire household (based on self-certification and any back-up documentation).
21. Enter only the portion of rent paid by the household.
22. Enter the utility allowance for the unit.
23. Enter subsidy portion of rent, if applicable.
24. Enter income set-aside percentage household qualifies for.
25. Management representative who conducts interview or collects information from HOH signs, prints name, and enters date here.

