

## Self-Certification of Annual Income Form

## Instructions

**Purpose:** 100% income- and rent-restricted Low Income Tax Credit Properties must use this form to recertify residents every year.

**Note:** If the Self-Certification form is being used, then verification of income and assets is not required by WSHFC but still may be required by the property's other funders.

### General Information:

This form must be completed within 120 days prior to each household's lease anniversary date.

An "Adult" is a household member who is at least 18 years old. A "Head of Household" (HOH) can also be an emancipated minor. If the head of household is an emancipated minor, they are considered an Adult for the purpose of filling out and signing this form.

- A. Property manager must fill in section called **Apartment Manager**.
  - 1. Enter the property name, household's unit number, number of bedrooms in the unit, household name and number of persons in the household.
- B. HOH must fill in **Part 1: People in Your Household**.
  - 1. Print name of HOH.
  - 2. Print HOH date of birth.
  - 3. Check "Yes" or "No" box in response to student question.
  - 4. Print names of additional household members on additional lines.
  - 5. Enter dates of birth for additional household members.
  - 6. Check "Yes" or "No" boxes in response to student question for each additional household member.

### Student question information:

A "Fulltime Student" is a student who is attending school for at least five (5) months in a calendar year. The months don't have to be consecutive. If a household member attended school in February, March, April, August and September, that would equal five months. Also, any part of a month counts as a whole month. A "Student" includes someone attending any type of school: kindergarten, elementary school, high school, college, night school, etc.

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**C. HOH must fill in Part 2: Income of Every Person Living with Me.**

1. Under **Name of Each Person Living in the Apartment**, enter the names of every adult member of the household. Start by entering the name of the head of household on the first line and then list the other adults. If there is a minor in the household that receives some kind of income or income from an asset, enter their name in this section as well.
2. Under **Total Yearly Income**, enter the total amount of income received by each person. If a household member receives more than one type of income or receives income from more than one asset, total all the income from all the sources together and enter the total in that field. For example, if the head of household receives annual wages of \$20,000 and also receives annual child support of \$12,000, add both amounts together and enter \$32,000 (20,000 + 12,000) in the **Total Yearly Income** field.
3. If you are unsure what counts as income or an asset, please review the examples of income/asset types on page 2 of this form under **NOTES**.
4. If an adult household member doesn't receive any income at all, and doesn't receive any income from an asset, then enter **zero** or **0** under **Total Yearly Income**.
5. Under **This Income is From**, enter the source of the income. Using the above example in #2, you would enter "wages and child support" in the **This Income is From** field.
6. If an adult household member doesn't receive any income at all, and doesn't have any assets, then enter "N/A" under **This Income is From**.
7. Under **Initials of Each ADULT**, each adult household member listed in Part 2 should enter their initials in this field. If you entered the name of a minor in Part 2, the head of household should put their initials in the **Initials of Each ADULT** field on behalf of the minor.

**D. Adult household members must complete the signatures section on the second page.**

1. HOH signs, prints name and dates where indicated.
2. Additional adult household members (18 or older or emancipated minor) sign, print their name and date where indicated.

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- E. Property Manager completes section under **Apartment Manager**.
1. Enter original move-in date.
  2. Enter effective date of re-certification; this date should be the anniversary date of the initial certification.
  3. Enter total gross income amount for entire household (based on self-certification).
  4. Enter only the resident portion of rent paid.
  5. Enter the applicable utility allowance for the unit.
  6. Enter subsidy portion of rent, if applicable.
  7. Enter the qualifying income set-aside percentage.
  8. Property manager signs, prints name, and enters date in this box.