

## 2024 Annual Bond Report Checklist

Property Name: \_\_\_\_\_ OID: \_\_\_\_\_

The following documentation is submitted in support of the annual report **via the electronic portal (submit each item as a separate document)**:

- This 2024 Annual Bond Report Checklist
- Certificate of Continuing Project Compliance Part A with Owner's **wet or digital** signature. You can generate this form at: <https://portal.wshfc.org/Forms/AMC-BondPartA>
- Certificate of Continuing Project Compliance Part B with the 2024 unit history for the set-aside units. An Excel spreadsheet with instructions is provided on our website at <https://www.wshfc.org/managers/forms-bond.htm>
- Special-Needs Vacancy Report, with back-up documentation, if the special-needs Commitments were not met.
- Affirmative Marketing Report (if applicable). To find out if your project is required to complete this report, go to <http://www.wshfc.org/managers/forms-bond.htm>.
- Section 8 renewal documentation (if applicable)
- Documentation for all Qualified Residents including new move-ins, those that transferred units, and those required to re-certify annually.
  - Certifications requested are for calendar year 2024.
  - Resident Certifications should be saved and submitted as separate files in the following format: Unit Number, Resident Last Name.
  - Certifications must include but are not limited to, copies of the following documents, assembled in the following order:
    - Household Eligibility Certification (HEC)
    - Rental Eligibility Application (REA)
    - Household Declaration Supplement to REA
    - Authorization to Release Confidential Information
    - Income verification documentation (must comply with the Bond Compliance Manual *Income Section*)
    - Verification of assets or Sworn Statement of Net Household Assets form
    - Disabled Status Certification (for projects with a disabled commitment)
    - Disability Verification if applicable
    - Student Certification (for projects using HUD Form 50058 and 50059 with a HUD questionnaire in place of our REA and households where all members are students)
    - Age verification for elderly-designated projects
    - Bond Lease Rider
  - Please use this link <https://portal.wshfc.org/Forms/AMC-BondReport> to submit all your annual report documents. Instructions on how to use this system are on our web site at <http://www.wshfc.org/managers/forms-bond.htm>.

Prepared By: \_\_\_\_\_ Date: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email: \_\_\_\_\_