

**Application Checklist**

The Application Checklist must be completed and submitted as the table of contents for the Application package. Applications must be tabbed numerically using the numbering system shown in this checklist.

If a tab is not applicable to an Application, it is not necessary to submit the information or a tab for that exhibit. Simply mark the checklist for that tab N/A.

**UNDERWRITING APPLICATION CHECKLIST**

**Items Included in the Application Package**

Yes	N/A	
<b>General Information</b>		
_____	_____	Tab 1 Development Synopsis and Intent to Submit Tax Credit Application Fact Sheet
_____	_____	Tab 2 Multifamily Core Application
_____	_____	Tab 3 Selection Criteria
_____	_____	Tab 4 Market Study/Housing Needs Assessment and Rent Comparability Study, if applicable
_____	_____	Tab 5 Schematic Plans / Scope of Work
_____	_____	Tab 6 Evidence of Site Control
_____	_____	Tab 7 Appraisals
_____	_____	Tab 8 Architect's Certifications
_____	_____	Tab 9 Community and Economic Impact / Community Revitalization Plan
_____	_____	Tab 10 Historic Preservation Documentation
_____	_____	Tab 11 Supportive Services
_____	_____	Tab 12 Accessible Units
_____	_____	Tab 13 Commitment to Offer Homeownership
_____	_____	Tab 14 Public Housing Authority Notification
_____	_____	Tab 15 Rent Roll/Displacement of Existing Tenants
_____	_____	Tab 16 Development Team Experience <b>and MBE/WMBE/WBE/VBE Participation</b>
_____	_____	Tab 17 Phase I Environmental Review / Environmental Test Results
_____	_____	Tab 18 Developments with Commercial Space - Commercial Income and Costs
_____	_____	Tab 19 Utility Information
_____	_____	Tab 20 Certification of Subsidies
_____	_____	Tab 21 Construction and/or Permanent Financing Letters of Intent
_____	_____	Tab 22 Bridge Loan Financing
_____	_____	Tab 23 Syndication Information
_____	_____	Tab 24 Development Cost Savings
<b>Additional Submission Requirements for PennHOMES Applications</b>		
_____	_____	Tab 25 Acquisition Notices
_____	_____	Tab 26 Displacement and Relocation
_____	_____	Tab 27 Community Housing Development Organization (CHDO) Certification
<b>Additional Submission Requirements for Tax Credit Applications</b>		
_____	_____	Tab 28 Attorney's Opinion for Acquisition Tax Credit
_____	_____	Tab 29 Waiver Requests
_____	_____	Tab 30 Nonprofit Set-Aside
<b>Additional Submission Requirements for Supportive Housing Set-Aside</b>		
_____	_____	Tab 31 Supportive Housing Preference
<b>Additional Submission Requirements for Preservation Applications</b>		
_____	_____	Tab 32 Financial Statements
_____	_____	Tab 33 Existing Financing and Regulatory Documents
_____	_____	Tab 34 Project Capital Needs Assessment / Energy Audit
_____	_____	Tab 35 Preservation Preference
_____	_____	Tab 36 Assumed Debt

**Additional Requirements for Tax Exempt Volume Cap Applications**

- \_\_\_\_\_ Tab 37 Statement of Qualification under Request for Proposals
- \_\_\_\_\_ Tab 38 Statement of Qualification for Tax Exempt Financing
- \_\_\_\_\_ Tab 49 Statement of Qualification for Tax Credits
- \_\_\_\_\_ Tab 40 Letter Outlining Bond Financing Strategies
- \_\_\_\_\_ Tab 41 Qualification of Bond Financing Team
- \_\_\_\_\_ Tab 42 Evidence of Bond Rating
- \_\_\_\_\_ Tab 43 Letter from Issuing Agency Requesting 42(m) Review

**All Applicants**

- \_\_\_\_\_ Tab 44 Innovation in Design
- \_\_\_\_\_ Tab 45 Additional Information (which may include evidence of an employment program, special state initiative or other information)

**Additional Requirements (Post Tax Credit Award) if applicable**

- \_\_\_\_\_ Exhibit 1 Submission Requirements for Additional Tax Credits
- \_\_\_\_\_ Exhibit 2 Monthly Status Report Form
- \_\_\_\_\_ Exhibit 3 Application Modification Guidelines
- \_\_\_\_\_ Exhibit 4 Application Modification Request Checklist
- \_\_\_\_\_ Exhibit 5 Carryover Attachment A