



Mini-Sessions

1.5 to 2 hours in length each

KEY: Basic – Fundamentals; Moderate – Beyond basics but not advanced;
Advanced – Must have sound understanding of compliance.

Session Name	Description	Level
<i>Survivor Tax Credit... Understanding Site Compliance:</i>	Perfect for the new Housing Credit professionals or veterans looking to start the day out with a sound fundamental session! In this session, Elizabeth will walk you through the fundamentals that must be understood to master site compliance.	BASIC
<i>Completing Your Annual Recertifications On Time... Every Time</i>	One of the most frustrating parts of Housing Credit compliance! Learn the secrets to completing this task on time... EVERY TIME and how to avoid noncompliance even when your tenants are the ones to blame!	BASIC to MODERATE
<i>Winning the Paper Wars... Successfully Documenting Compliance</i>	Do you find yourself swimming in paper... or does it feel more like drowning? In this session Elizabeth will explain exactly what do you need to document, file and retain and give you recommendations to keep you from drowning in a sea of papers.	BASIC to MODERATE
<i>The Good... the Bad... the Ugly: Understanding the 8823 Guide</i>	One of the most important reference guides in our industry... but are you familiar with it? You should be because your state is! Learn the ins & outs of this guide including how your state will be using its provisions to monitor your properties.	MODERATE to ADVANCED
<i>The Balancing Act... Dealing with Layered Housing Credit Deals</i>	We all have them... Housing Credit properties layered with HOME, Bonds, Section 8, RD and state or local programs. Some of us have them layered with 3, 4 and 5 different programs! For many they are a nightmare! But unfortunately this is a nightmare we must face head as more and more Housing Credit properties will be layered with other housing programs making compliance even more challenging. In this session Elizabeth explains how to determine all of your compliance requirements and merge them into a successful marriage!	ADVANCED
<i>Anything Goes with Elizabeth: A Q&A Session</i>	You know ya got 'em so bring them in! Whether you are new to Housing Credit compliance and management or a veteran with years of experience, Elizabeth will tackle each with candor steeped in experience.	BASIC to ADVANCED
<i>Working with the Full-Time Student Rule</i>	The student rule has gone through many changes in the last few years enough that most of us feel dizzy. Let Elizabeth set you straight on the rule as it stands today providing you with tips and techniques for its successful implementation.	BASIC to MODERATE
<i>Meeting the IRS's Due Diligence Requirements</i>	In the 8823 Guide, the IRS spells out exactly what compliance due diligence should look like. Do your operations mirror the IRS's image? In this session, Elizabeth walks you through these requirements and discusses its impact on your operations.	ADVANCED
<i>Understanding and Handling Noncompliance</i>	Most fear noncompliance. Some hide from it. And still others become unrealistically obsessed with it. In this session, Elizabeth explains how noncompliance affects our properties, how it is identified by your State Monitoring Agency and what the IRS does with 8823s giving you a healthy perspective so you no longer need to live in fear of it.	ADVANCED
<i>Passing Your Audits with Flying Colors</i>	Winning ways to survive your next audit... whether with your State Monitoring Agency or your investor!	BASIC to MODERATE

Full Sessions – 1 to 2 Days

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Session Name	Description	Level
<i>Housing Credits 103: Income & Assets</i>	One of the most frustration and overlooked areas in compliance training is income and assets. For some reason, it is assumed everyone has experience with this as it is very similar to the Section 8 Program. But the reality is, most of us have limited or no Section 8 experience and if we do have experience, the differences between Section 8 and Housing Credits are enough to cause even a Section 8 veteran to be in noncompliance. This course is dedicated to this very subject detailing what income and asset sources you must include; how to verify these sources; and then how to annualize these sources for income eligibility. Chock full of real life examples. No matter how long you have been in the business, if you are responsible for calculating income eligibility, approving the files of new moves or supervising those that do, this course is a must!	BASIC to MODERATE
<i>Housing Credits 204: Unique Program Rules</i>	Oh, the rules of the Housing Credit Program – from students to unit transfers to the Available Unit Rule – this program is laden with unique rules! In this course, you will be introduced to each of the unique Program rules and given a thorough explanation of each including illustrations of how to apply the rule in the real world. Whether your property is 100% Housing Credit or mixed income, these rules affect your property and must be understood to remain in compliance. The rules examined include full-time students, non-transient occupancy, suitable for occupancy, resident manager's units, annual and interim recertifications, the Available Unit Rule, the Unit Vacancy Rule and unit transfers.	MODERATE
<i>Housing Credits 205: Income Limits, Rents & Utility Allowances</i>	We all know that our residents have to be income eligible for a Housing Credit unit and must then pay a rent amount within the Program parameters. But what are these limits and how do we determine what they are for our properties... especially under all the new rule changes? In this course, we will take a detailed look at the income limit, rent and utility allowance rules, how to determine your property's limits and how to calculate these all-important numbers. These rules are the cornerstone of compliance making this course a must for supervisors, compliance coordinators and asset managers.	MODERATE
<i>Fair Housing 101: A Fair Housing Primer</i>	This course teaches you the fundamentals of fair housing including what the 7 federally protected classes are and how the people in these groups are protected. This course also discusses the common mistakes made that cause noncompliance with these laws and gives you techniques to avoid these pitfalls including how to set occupancy standards to ensure you are not violating familial status, how to handle accommodation and modification requests, and much, much more!	BASIC to MODERATE
<i>Housing Credits 445: National Compliance Professional</i>	This comprehensive course is designed to help you gain an extensive understanding of the Tax Credit Program from allocation to site management! Perfect for those wanting to take their Tax Credit knowledge to the next level and attain EXPERT status. A must for supervisors, troubleshooters, compliance directors, asset managers or anyone looking to move into such positions. It is also perfect for those looking to earn one of the industry's upper level Tax Credit designations including our NCP, the Home Builder's HCCP or Spectrum's C3P. The easiest and best way to become a Tax Credit expert and prepare yourself to earn one of the industry's top Program designations!!	ADVANCED
<i>Housing Credits 530: Acquisition/Rehabs... Rent Ups</i>	Renting up an Acquisition/Rehab Tax Credit property is not for the faint of heart! Your responsibilities in completing such a rent-up move you away from those of a typical rent-up as you will often find yourself dealing with very specific management issues including existing tenants -- some of whom are a problem and/or that become uncooperative as well as previous management problems and/or vacancy issues. Beyond these issues, acquisition rehab rent-ups bring about a myriad of special regulations you need to juggle all while moving your tenants around the property so the physical rehab work can be performed! In this session, Elizabeth will explain Acquisition/Rehabs in layman's terms, share the owner and investor's expectations, and discuss how to tackle this unique type of rent up.	ADVANCED
<i>Hot Compliance Topics for LIHC & Other Affordable Housing Programs</i>	This session will discuss and review the hottest compliance topics in affordable housing and provide solutions for helping you deal with them on your properties. Topics subject to change. Sample topics include: VAWA implementation, disaster relief, 8609 Line 8b election, Audit Techniques Guide, income limit implementation, rent noncompliance and non-profit material participation.	MODERATE to ADVANCED