

We Have The Tools That You Need To Make Your Job Easier!

Why Recreate the Wheel??



Make your job easier using our time, energy, expertise and experience!

Rummage through our chest of tools created using our expertise and years of hands-on, practical experience. Everything from a comprehensive compliance forms package to a step-by-step system that will assist you in writing your compliance policies and procedures in no time flat! We have taken our years of experience working in the field as well as Elizabeth's considerable expertise and practical knowledge to create an array of products and services that are useful and immediately able to be implemented in your operations!

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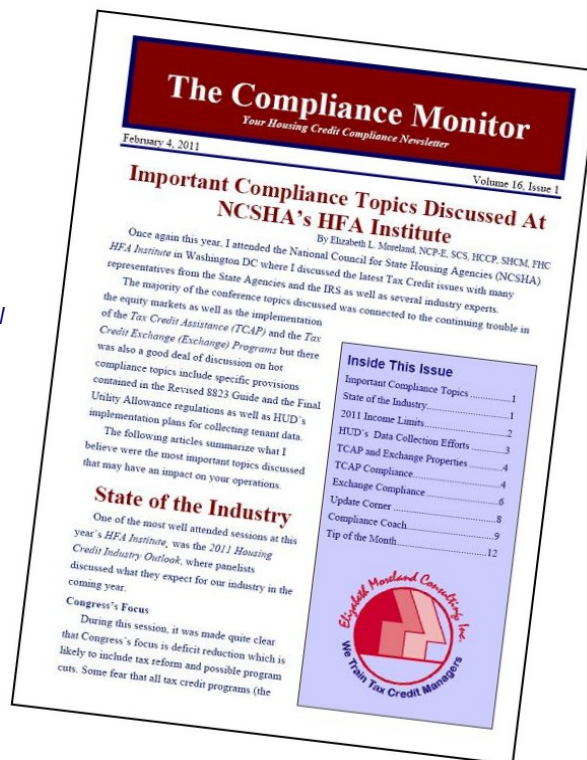
Website: www.taxcredit.com

Your Very Own Information Highway!

The Compliance Monitor

If you are not familiar with our newsletter, The Compliance Monitor let me point out a few facts...

- ✓ The Compliance Monitor is the tool I use to give all of the information I have collected as a Housing Credit professional, national trainer and consultant in a useable, reality based manner.
- ✓ The Compliance Monitor is a tool for you to learn the latest that is happening in our industry including what new rules are being published; the latest interpretations that are being made in the gray areas; and the best techniques that are available to allow you to do your job better, faster and with less stress.
- ✓ The Compliance Monitor is my forum to speak with those of you who are concerned with keeping your Tax Credit properties in compliance and are interested in making their job more than just a necessary evil rather an opportunity to do some good in a substantially less stressful environment!
- ✓ And finally, The Compliance Monitor is the Tax Credit industry's most valuable, longest running newsletter dedicated solely to the subject of Tax Credit compliance and management!



Recent Articles Contained in The Compliance Monitor...

- Definition of "Calendar Year" Brings Back Old Student Rule Frustrations
- After Affects of the Annual Recertification Exemption
- Meeting the IRS's Due Diligence Requirements
- Understanding the State's Post Year 15 Compliance Procedures
- Controlling Noncompliance with Internal Audits
- Fair Housing Guru Provides Suggestions For Handling Fair Housing Complaints
- Understanding Acquisition/Rehabs
- Dispelling the Myths of the Available Unit Rule
- Effects of the Line 8b Election
- A Detailed Look At An Acquisition/Rehab Rent-Up
- Much Ado About Rents
- TCAP and Exchange Compliance Requirements
- IRS Opines on First Year Anniversary Recerts
- Dealing with Multiple Allocations of Credits
- Preparing for the 2011 Income Limits
- Bed Bugs Possible Compliance Issue
- Understanding the Development Side and How It Affects Compliance
- Latest News on HUD's Data Collection
- How Do You Calculate Year-To-Date Income? That is the Question

- Limited English Proficiency Guidance Causes Much Industry Concern
- Designing Efficient Compliance Operations
- Back to Basics: Calculating Social Security Increases
- Understanding Noncompliance & Recapture

Regular Features Including...

- Tip of the Month
- Update Corner
- Compliance Coach

I don't know if you know this or not but I live and breathe Tax Credits so you don't have to!

I am a member of several Tax Credit organizations and am highly involved in those that are active and on the cutting edge. I participate in their meetings; I travel to their conferences; I listen to the gurus and the experts; and I speak up and defend the compliance and management aspects of this Program at all costs! (Trust me when I tell you that I am not always the most popular person at these meetings. Especially when I won't let them sweep compliance under the carpet like so many want! Or when I won't just take "you can't do that" or "that is just the way it is" as a response.)

What Subscribers Are Saying...

"A must read for LIHTC managers. You'll gain in depth knowledge on issues you may have questioned – and learn about issues you may never have considered." **Karen Newsome, Vice President, Winn Management Co., Boston, MA**

"I consult The Compliance Monitor for insight on the many gray areas of the Section 42 program. I save every issue." **John Perine, Property Supervisor, Herman Associates, Indianapolis, IN**

"The Compliance Monitor is a very useful tool for our Asset Managers in identifying the important issues and trends in connection to the management of a LIHTC property. The TCM provides practical solutions that are presented in a concise and easy to understand format. We share this information with all of our Section 42 property managers throughout the country frequently recommend Elizabeth Moreland training." **Fred Monteiro, Managing Director, Michel Assoc. LTD., Boston, MA**

"I am very grateful for the information I receive in The Compliance Monitor. This info comes on a timely & consistent basis. We always receive updated information on topics of major concern. I had a debate re: the issue of applicable fraction with a co-worker who managed another property the next issue of "TCM" explained the issue so well and understandable I was in shock. It was as if they knew we needed a judge to clarify." **Anne Sutton, Community Manager, California Real Estate, San Jose, CA**

"The Compliance Monitor is an excellent newsletter for those involved with Tax Credit Compliance. The management of Tax Credit properties can be very confusing for those who are uneducated in the multitude of regulations involved. The Compliance Monitor newsletter gives current information that is always relevant to the reader. The information is given in a clear and concise manner which helps compliance staff understand the ever changing rules. I would highly recommend this newsletter to anyone interested in staying on top of the Tax Credit Program." **Connie Tolley, Vice President, Occupancy & Compliance, Meridian Group, Inc., Middleton, WI**

I also spend thousands of dollars learning about Tax Credits so you don't have to!

I travel to as many conferences that talk about Tax Credits as possible; I buy up as much reference material on the subject as I can find; I scour through Tax Credit books, newsletters, and trade magazines soaking up what the authors have to share;

and I frequently visit web sites and sponsor a Tax Credit Discussion Board of my own so I can keep in touch with what is going on in the trenches.

You might ask why I tell you this.

You see, when I left property management and started training and consulting it was because I was fed up with the lack of information – real information – not rumors – not half truths – but solid, useable REALITY BASED information!! My mission was and remains to this day to be an information gatherer that converts what I have learned into plain and useful English for those in the trenches and be the voice that wouldn't let anyone forget just how hard it is in the trenches!

That is where my newsletter comes into play. I use this tool to provide you solid information that you can use in the Tax Credit world. Accurate information and not just rumors, half-truths or my viewpoints disguised as the law of the land. Yes, I do share my opinions but I will never offer them up as anything other than my opinions! I also work hard to find competent and reliable resources for information and then share it with you in the most concise, useable way possible.

In essence, I tell you this, because through The Compliance Monitor you are getting me in your corner!

Reaching reach out and telling you what is going on, what new rules or interpretations are being introduced and how you should apply them to your property and your job. To share with you the insights that my traveling around and meeting with thousands of managers, compliance specialists and other Tax Credit professionals can give. And to introduce to you techniques that can make your job easier, better and less stressful!

ONLY \$239!!

(The \$219 price reflected on website is only available to those who subscribe online)

EVERYTHING you want to know about the Tax Credit Program in plain-English!

Practical Solutions for Managing Tax Credit Developments™

The Tax Credit Program as we have known it is gone! The Program has undergone so many changes that it is truly a different Program than what it was just 5 short years ago. Quite frankly, we are entering into a New Era of Compliance. Now... that isn't necessarily a bad thing. Some of the changes the Program has experienced are fantastic. Of course, not all the changes have us jumping for joy but that is the nature of the game.

BOTTOMLINE: The Program is different. Compliance is different. And, the way in which we operate our properties must be different!

With that being said... I must ask...

**Are you equipped to handle these changes?
Have you thought through how you will
implement them into your operations?**

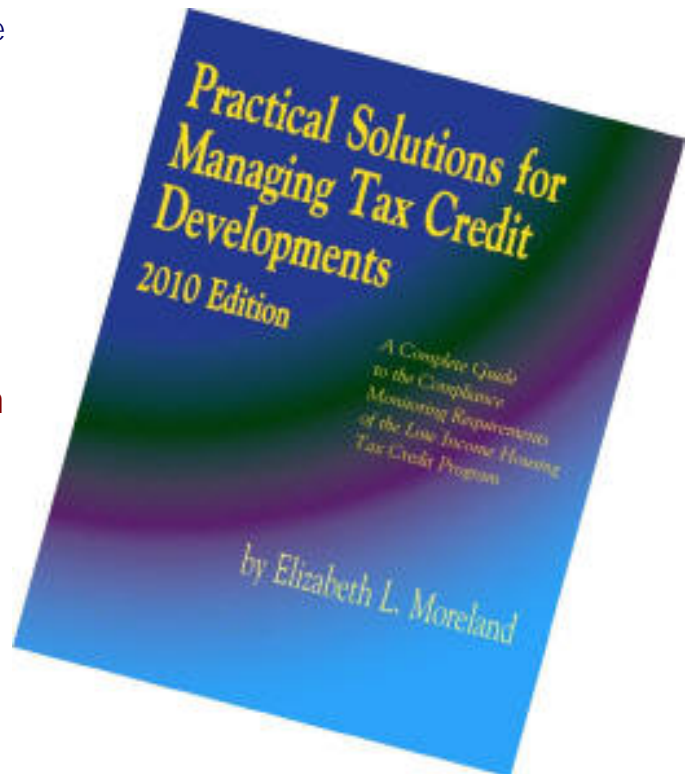
These are crucial questions. I don't know about you, but I am still trying to keep everything straight in my head and constantly find myself questioning whether I have all the nuances correct. I regularly have to look up stuff just to be sure. And... this is all I do! Unlike you... I'm not trying to manage a portfolio of properties, supervise staff, troubleshoot problems, and report to owners and investors. If I am having a hard time keeping everything straight... I can only imagine your difficulty! And that is exactly why I took the time to re-write my book – *Practical Solutions for Managing Tax Credit Developments – 2010 Version* – and am making it available to you!

If you are not familiar with *Practical Solutions for Managing Tax Credits*, I am talking about the book that the industry has been calling its "Compliance Bible" since the first version was published back in 1995. It contains everything you want and need to know about the Tax Credit Program and how to manage it successfully! And best of all... IT'S BEEN FULLY UPDATED TO INCLUDE ALL THE CHANGES we now face!

The newly updated guide contains...

- A clear & concise explanation of each Tax Credit rule
- Practical techniques and tips showing you how to apply these rules at your properties
- Ideas for an efficient and STRESS-FREE management!

Every chapter is written in layman's terms taking the difficult language of the Program requirements and translating them into understandable and user-friendly terms! No legalese or bureaucratic gobbly-gook that only an attorney or accountant understands! And every chapter contains numerous tips and techniques that have actually been tested on-site and have been proven to work. Not only does this guide explain the rules but it then goes on to illustrate the



best ways to implement procedures for handling them! Making this the perfect weapon to have on hand as you continue to work in this new Era of Compliance!

Don't be left unarmed... order your book today!!

**Order your copy today for only
\$495**

Get your site staff on the same page...

Housing Credit Compliance Policy & Procedure Boot Camp In-A-Box Kit

Psst... the IRS Reveals An Important Compliance Secret... And We've Got the Blueprints!

Not sure what I am talking about? Feeling left out 'cuz ya haven't heard about any secret or seen any blueprints? Well you have... you just may not be aware of it! In fact, it came directly from the IRS themselves. All laid out in 1 simple sentence...

"...the IRS will treat all households documented as initially income-qualified households as income-qualified as long as the owner demonstrates due diligence when completing the initial income certification. Therefore, the owner does not violate the Available Unit Rule when a unit is unintentionally rented to a nonqualified household."

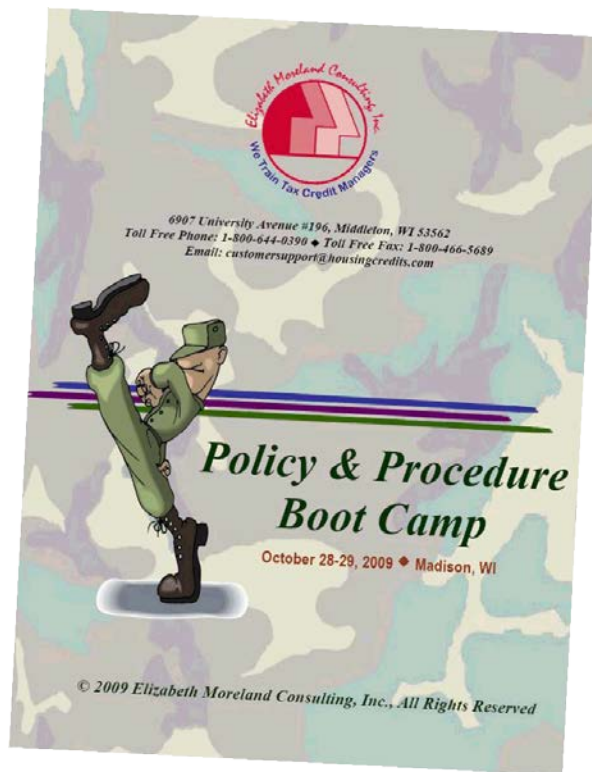
This statement came directly from Grace Robertson (the IRS's Program Analyst overseeing LIHC Program compliance) herself when writing about how the IRS would handle Available Unit Rule violations on 100% properties implementing the annual recertification exemption! But she has said it before... numerous times in fact. And she spelled it out thoroughly in Chapter 3 of the 8823 Guide (both the final and revised versions) when she defined due diligence and then described what it looks like on a Tax Credit property. Let me refresh your memory...

"Due diligence can be demonstrated in many ways, including (but not limited to) establishing strong internal controls (policies and procedures) to identify, measure, and safeguard business operations and avoid material misstatements of LIHC property compliance or financial information."

In our heart of hearts we have always known policies and procedures are crucial. We really didn't need the IRS to tell us by having them we were demonstrating strong internal controls and standardized operations. Believing this fact isn't the problem. Writing them is!! Just finding the time is nearly impossible. Plus, let's be honest, it is a nasty job! Boring, tedious, and well, even a little painful. But as the IRS has so poignantly pointed out to us WE MUST GET THEM WRITTEN if we are going to avoid noncompliance ESPECIALLY ON OUR 100% PROPERTIES!!

So here is the million dollar question...

**Do You Have Standard Operating Policies and Procedures
Specifically Related To Housing Credits??**



Unfortunately, the answer is probably no. At the very least, I venture to guess they aren't written down, and tested frequently. But the time has come... you cannot afford to delay anymore! The IRS has been very clear and is pushing your State Monitoring Agencies to look for your policies & procedures especially when deciding if they need to expand an audit or when making noncompliance determinations!

Our P&P Boot-Camp-In-A-Box Makes It EASY!!!

In October 2009, we conducted yet another one of our Policy & Procedure Boot Camps, this one called P&P Boot Camp Revisited. This was actually our 3 Boot Camp focusing on helping companies design, WRITE, and implement their compliance policies and procedures in a conducive environment AWAY from the office and with other industry professionals focused on the same goal. During these Boot Camps, our attendees actually wrote their policies with Elizabeth Moreland helping them every step of the way. When the camp is over... so is the majority of the policy and procedure task! It truly has been incredible every time we have held such an event.

Now... we currently don't have another Policy and Procedure Boot Camp event schedule. Probably will do one again, just not sure when. BUT, in the meantime, I know you understand just how crucial getting these policies written is to your company and compliance on your properties! So we have created our P&P-Boot-Camp-In-A-Box to help you accomplish this task! And trust me when I tell you... it is the next best thing to attending an actual live event!

Your P&P Boot Camp-In-A-Box contains...

- The Main P&P Boot Camp Guide: Giving vital information on how & why policies and procedures are needed plus step-by-step instructions on how to write them. It also breaks down the critical Tax Credit policies that all of us need and gives sample policy statements as well as a list of bullets that walk you through all of the considerations you should take in writing the procedure portion! All you need to do is fill in the blanks!
- A Housing Credit Compliance Supplement: Details the important rules of Tax Credit compliance so you have them at your fingertips when writing your actual P&Ps. The supplement covers all the important compliance rules including unit transfers, the Unit Vacancy Rule, students, Next Available Unit Rule and much, much more! The best part is that the supplement is written in plain-English and carefully yet succinctly explains the rules and the considerations each of us must make when applying it.

and ARE YOU READY FOR THIS?...

- A Disk Containing ELECTRONIC SAMPLES OF THE ACTUAL P&Ps Produced By The Attendees Of Our Live Events! Since we know that you have a limited time to write these procedures, we wanted to give you every advantage and that is the reason for including this disk! Besides containing our Policy & Procedure Template, this disk contains the electronic version of all the actual policies & procedures produced at the two live events we held in 2002 and the one we did in 2009! So most of the work is done for you!!! All you have to do is read through the different samples for each policy created by these attendees and choose which one you want to adopt as yours. Or you can combine or pick & choose from several different samples ultimately creating a set of policies that are perfect for your company! As I said... we want to help you accomplish this task fast!

PLUS... if you think you might need some help along the way...

- Add a 1 Year Subscription to the Compliance Coach to your P&P-Boot-Camp-In-A-Box! The perfect companion! By adding the Compliance Coach to your P&P-Boot-Camp-In-A-Box, you have the ability to ask me questions and run your thoughts past me as you create these policies! Our Compliance Coach

service gives you up to 1 hour of my time per month to ask me questions, so if you get stuck or find yourself debating which direction to go on a particular policy, you can run it past me. (This does not include me researching an issue or reading and/or approving your policies rather is a Q/A service to assist you in making the correct policy decisions.)

Option A... Companion Pack

- P&P-Boot-Camp-In-A-Box AND
- 1 Year Subscription to the Compliance Coach!

ONLY \$895

Option B... You Choose

- P&P-Boot-Camp-In-A-Box OR
- 1 Year Subscription to the Compliance Coach!

ONLY \$695

A comprehensive set of forms that will work for you, not against you...

Certification Processing Kit™ *English OR Bilingual Version (Spanish/English)*

The industry's best tool for proving compliance and thoroughly documenting the resident file. Complete package for processing your move-in certifications and annual recertifications.

FULLY UPDATED JULY 1, 2011!! INCLUDES...

- All forms updated forms to meet new compliance and fair housing requirements.
- Added new forms to help better verify retirement accounts, annuities, and life insurance.
- Step-by-Step Worksheets to help you better process student eligibility for Section 8 and Tax Credit properties as well as blended properties.
- All the Section 8 student eligibility forms you need including Parental Independence Self Affidavit, Parental Income Eligibility Declaration, Parental Absence Self Affidavit, and Parental Financial Assistance Self-Affidavit.
- Step-by-Step Real Estate Worksheet to help you determine cash value.

And much, much more!



Forms Included In Package:

- **Initial Application & Recertification Questionnaire:** Two simple yet comprehensive forms to determine all income, assets and other eligibility information from the applicant/resident and his household members. Each eligibility question is cross-referenced for your ease of determining the exact verification in which to have the applicant complete and/or to be sent to the third-party source. Takes all the guess work out of the applicant interview and allows you to begin processing the paperwork immediately and on the right foot!
- **Income and Asset Verifications:** A complete set of income and asset verifications including, but not limited to, an Employment, Social Security, Public Assistance, Bank, and Real Estate verifications. A total of 16 third-party verifications. Each have been thoroughly tested and proven to get results from even the slowest third-party sources. **New in 2011:** Pension, Retirement Savings and Whole Life Insurance Verifications

- **Self-Affidavits:** A set of self-affidavits for those types of eligibility items that only the applicant/resident can attest to. A total of 7 forms including, but not limited to: Self-employment, Zero Income, Disposed of Assets, Live In Care Attendant, Unborn Child, and Marital Status. Each of these affidavits allows you to gather the right information from the applicant and obtain the appropriate signatures. **New in 2011:** Unborn Child and Marital Status Self Affidavits.
- **Full-Time Student Forms:** One of the more difficult eligibility items to verify! This kit include the forms you need to verify student status correctly and accurately for both Tax Credits and Section 8 properties. **New in 2011:** Worksheets to help you process student eligibility on Tax Credit, Section 8 and blended properties, Student Financial Aide Verification, Section 8 and RD Student Eligibility Self Affidavit, Section 8 Parental Independence Self-Affidavit, Section 8 Parental Income Eligibility Declaration and Certification, Section 8 Parental Absence Self-Affidavit and Parental Assistance Self-Affidavit.
- **Legal, Auditing and Inspections Forms:** An easy-to-use Tenant Income Certification, Intent to Lease and Lease Addendum. Also includes File Audit Report, Unit Inspection Form, Common Area Inspection Form, Exterior Inspection Form and Move-Out Inspection Form.
- **Complete Set of Instructions:** Written in plain-English detailing the best way to complete your initial move-in paperwork and annual recertifications. **New in 2011:** Fully updated to include all the new rules brought on by the recent changes to the Tax Credit Program!
- **Applicant/Resident Brochure:** Explaining ... in easy-to-understand terms ... the Tax Credit Program. Ideal for sharing with applicants who are applying for a Tax Credit unit and are confused with the entire eligibility process! This is the same form I used when I was on site (updated a few times of course) that helped me explain the process to my applicants and helped me reduce the number of calls and question I would get from applicants regarding their application status!

Additional Forms Included:

- **Prospect Information Sheet:** A complete tool to assist you in gathering the preliminary information on a Tax Credit applicant that expresses interest in your apartments. Great for documenting marketing traffic as well as making pre-qualification determinations.
- **Waiting List Application:** A preliminary application for the prospective applicant. Allows you to gather enough information to run your background checks and determine if the applicant is a candidate for the waiting list.
- **Building Lease-Up Status Report:** Rent up can be grueling. Plus you usually have a million and one reports to complete. The form that will allow you to accurately and precisely track each building's lease-up and determine the month-end fraction on a building by building basis.
- **Project Qualified Occupancy Report:** At any given time, you can be expected to complete a report detailing the projects overall occupancy and each building's applicable fraction. Now, you have the form that will help keep track of this information and make it reportable to even the pickiest auditor.
- **Unit Inspection Report:** Gotta do 'em. But now you have a form that will assist you in completing and documenting them.
- **File Audit Report:** Again, a necessary evil. But now you have a form that tells you what to look for so you can pre-audit your files like a real professional!!
- **Verification Tickler:** No more sending your verifications out into Never-Never Land hoping they will return. This form allows you to document and track the status of all of your verifications and to ensure you have all required forms BEFORE you begin processing the certification/recertification.
- **Tenant Certification Summary:** Many of your resident's will stay with you for years. This means multiple recertifications. In an effort to summarize the household's eligibility status each and every year, this form

allows you to jot down the most pertinent information so it can be reviewed at a glance. No more shuffling through the entire file to answer simple questions or to review the resident's eligibility history!

- **Income Worksheet:** Completing the Tenant Income Certifications can be challenging. Especially if you MUST use a State Agency form! But with the Income Worksheet, you can determine income eligibility quickly and accurately and then use this information to transfer it to even the vilest of Tenant Income Certification forms!
- **Transfer Worksheet:** Unit transfers are always popping up on your property. With this simple form, you can be sure to document the actions you took, the unit numbers involved and the eligibility information. This form makes even the trickiest transfers easy!
- **Reasonable Accommodation/Modification Verification Forms:** Several new forms to help you with your fair housing responsibilities including a Reasonable Accommodation/Modification Request Form and a Reasonable Accommodation/ Modification Verification Form – allowing you to document the entire process.
- **Education Tracking Form:** Maintain a history of all your staff members and their classroom attendance for fair housing, Tax Credit, HUD and any other programs in which they need to have continuing education.
- **NCSHA's Best Practices Forms:** We've added all the Best Practices forms created by the National Council for State Housing Agencies and frequently implemented by the State Monitoring Agencies from across the country.
- **Recertification Notification Letters:** Series of letters you can use to notify your residents of their upcoming annual recertifications reminding them of their cooperation responsibilities.
- **Student Eligibility Worksheets:** Whether following the Section 8 or RD's student rule, the Tax Credit Program's full-time student rule or both, we have the worksheets that will walk you through the maze of these complex rules allowing you to determine student eligibility and document compliance!

The Certification Processing Kit includes:

- **Electronic Version of Each Form:** A CD-Rom containing all the files used to create the forms and the PDF files of each form for easy cross platform printing.
- **Kit Also Includes:** A license to reproduce and change forms for company-specific use, a CD containing all the files used to create the forms and the PDF files of each form for easy cross platform printing.

<p><i>First Time License: Only \$395!</i></p>	<p><i>Currently own our Certification Processing Kit but want the Updated 2011 Version? No problem! If you own the 2004 version... update to the 2011 Version for ONLY \$199</i></p>
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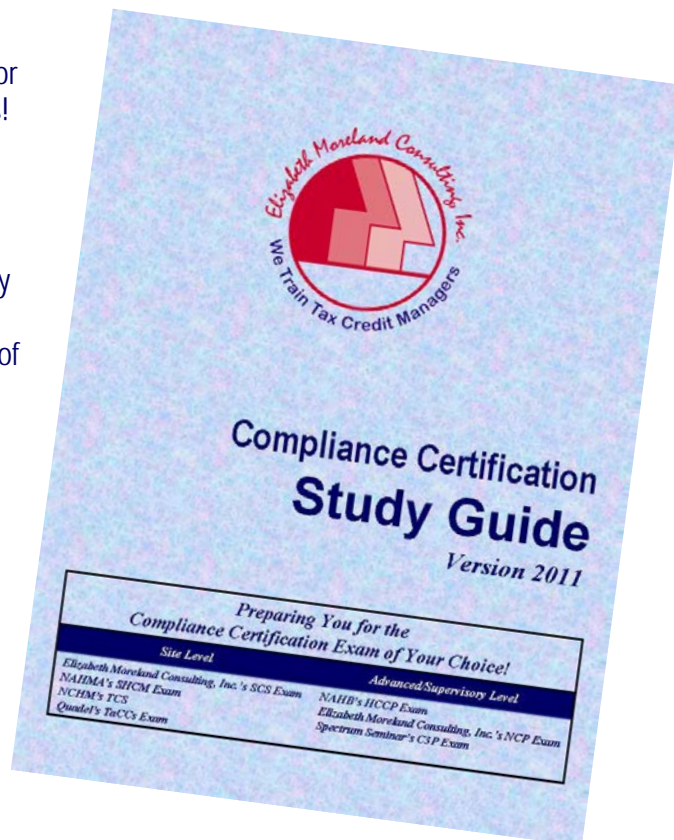
Preparing for the Compliance Certification Exam of Your Choice Has Never Been So Easy!

Certification Exam Study Guide

Let's be honest ... those certification exams are tough! Whether the National Compliance Exam, the HCCP test or the C3P test... doesn't matter... they are all tough exams! But don't let that frighten you away! As with anything that is tough, the rewards of success are sweeter!

So yes, the Exam may be challenging, but along with the challenge comes the star-power to those that successfully take on the Exam and pass! Individuals who have successfully completed the Exam stand out in the crowd of Housing Credit Professionals as:

- Knowledgeable!
- Confident!!
- Fully-prepared to take on the toughest of compliance scenarios!!!
- And best of all, these individuals are...
 - sought-after;
 - highly-respected;
 - and among the highest paid in our industry!!!!



Because of this, I want to help you pass the exam of your choice so you can reap these benefits and that is why I spent part of this summer updating this one-of-a-kind guide!

**Whatever exam you are taking...
NCP, HCCP, C3P, SHCM, SCS, etc... this guide will prep you!**

Fully updated to include all of the new rules as well as the information you need to know about each of the available industry compliance certifications and exams, this is a fantastic tool for those looking to show the industry you are a true professional!

The Compliance Certification Study Guide contains an EASY-TO-READ chapter on each common Testable Areas of the different compliance certification exam available to our industry! Whether you are taking on one of the advanced certification exams (NCP, HCCP, or C3P) or one of the site exams (SCS, SHCM, TCS or TaCCs), this guide thoroughly explains the concepts of each Testable Area using REAL-LIFE EXAMPLES to illustrate the important points. And, to help you further, when I updated the guide, I specifically include a road map that tells you which chapters you should complete for each specific certification exam so you don't have to waste your learning information that is beyond what will be covered on the exam of your choice!

Plus... it doesn't end there! Once you complete each designated chapter associated with the exam of your choice, you can test your knowledge of the material by taking the included SAMPLE TEST!

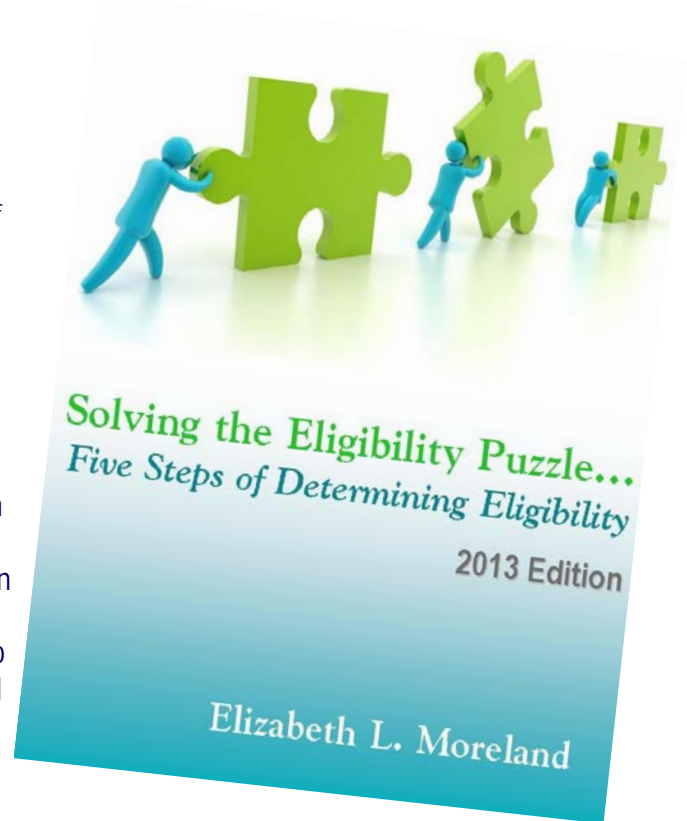
**So if you are planning to take a certification exam,
fast-track your chances of passing
by picking up this updated guide today!
Only \$299**

Its BAACCKKKK... the popular guide all site staff want!

Solving the Eligibility Puzzle... Five Steps of Determining Eligibility

If you are not familiar with this book, this is the one that your co-workers and peers are talking about. The book that explains everything you need to know, understand and do at the site level and as a compliance specialist! The book that walks you through... step-by-step... the process of determining initial eligibility and answers all of those nagging questions about verifications, income and assets, students, initial certifications and other key site compliance issues you face on a daily basis! A guide written in straight forward language with practical insight and with as little legalese as possible!

Solving the Eligibility Puzzle... Five Steps of Determining Eligibility is a handbook that was written in answer to the pleas from site people to give them an EASY TO READ resource tool that they could go to when they have questions rather than waiting for their supervisor to return their call or guess as to which way to handle a particular applicant scenario! A book that would concentrate on what they cared about... and that would be simple and to-the-point!



Whether you are starting rent-up or you are in the middle of your compliance period and handling turnovers, this book will walk you through the entire process and answer your questions.

- ☑ Easy-to-read style!
- ☑ Loaded with lots of examples, checklists, tips and techniques!
- ☑ Perfect for new hires, on-site staff and compliance specialists!

Not only will it cover the eligibility rules, but it also will cover techniques for getting this whole process completed... timely and accurately... including:

- ☑ How to interview ONCE and get all the paperwork needed the first time!
- ☑ How to get verifications returned from 3rd party sources quickly & completely!
- ☑ How to work with full-time student households & document eligibility fully!
- ☑ How to calculate income and asset income to determine eligibility accurately!
- ☑ How to make the move-in happen smoothly!
- ☑ How to document your files so even the finickiest of auditors are happy!

This book has proven to be an invaluable tool for your site people and compliance staff. It is also an excellent training tool even if the most you can do is hand it to your new hire and tell them to read it.



Includes all program changes through Change 4 of the HUD Handbook and Revenue Ruling 2013-17 released in August 2013!

ONLY \$249

Learn More About Specific Compliance Topics

Special Reports

Each report dissects the topic at hand as well as includes several articles discussing the subject, related Compliance Coach questions/answers and useful forms if applicable.

Each report is \$99 including delivery and can be ordered by clicking the appropriate link below. Reports will be delivered electronically and will be in an Adobe Acrobat PDF format.

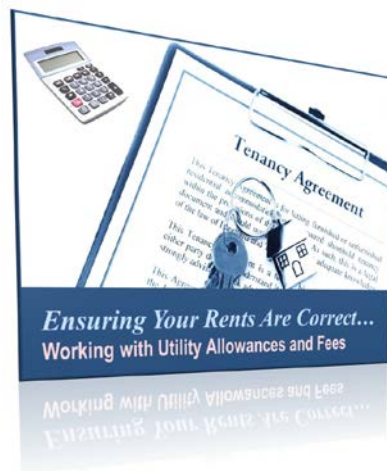


Ideas for Designing Efficient Compliance Operations

This 84-page report discusses...

- IRS's Due Diligence Expectations
- Staffing, Education & Procedural Considerations
- Examines Systems to Help You Thrive & Survive
 - On-site Secrets to Success
 - Annual Recertification Systems that Work
 - Controlling Noncompliance & Internal Audits
 - Documentation & Record Retention

\$99



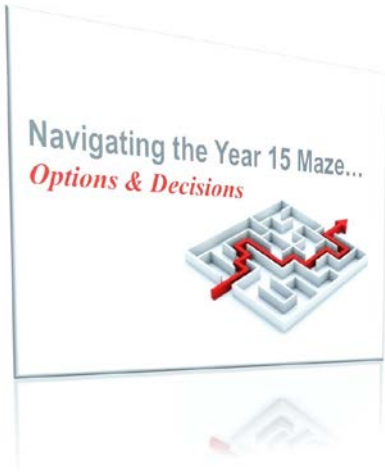
Ensuring Your Rents are Correct... Working with Utility Allowances & Fees

This 53 page report addresses examines utility allowances and fees and their effect on your Housing Credit rents.

Discussions include...

- Final Utility Allowance Rules
- Submetering
- Utility Allowance Noncompliance
- Rent Noncompliance

\$99



Navigating the Post Year 15 Maze... Options & Decisions

This 489-page report helps you navigate your way through your Housing Credit properties Post Year 15 options and examines the pros & cons of each...

- Qualified Contracts
- Subsequent Allocations
- Remaining in the Program

\$99

This report also includes a summary of Post Year 15 Compliance Monitoring Procedures state by state.

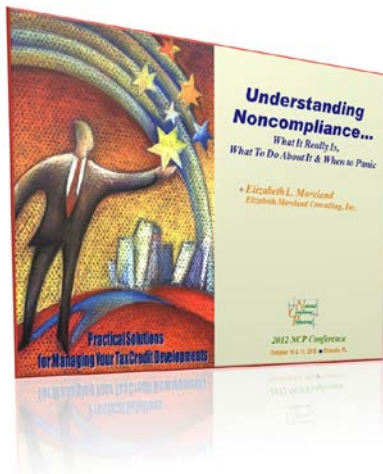


Tricky Income Scenarios

This report examines some of the most tricky income & asset scenarios including...

- Tips
- Seasonal or temporary employment
- Self-employment
- Rental Income
- Reversed Mortgages
- Short Sales & Foreclosures
- Land Contracts
- Retirement Accounts
- Stocks & Mutual Funds
- Trusts

\$99



Understanding Noncompliance... What It Really Is, What To Do About It & When to Panic

This 32-page report discusses the scariest subject in the Housing Credit Program... NONCOMPLIANCE. But not all noncompliance is created equal and to master it you must truly understand it. This report dissects...

- First Year Certification Mistakes
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