

# Low Income Housing Tax Credit (HTC) HTC BASICS

TRAINING PROVIDED BY:  
Janken Housing Solutions, Inc.  
7063 Terraceview Lane  
Maple Grove, MN 55311

**Instructor:** Juanita Pekay  
juanitapekay@jankenhs.com

## AGENDA

8:30 am to 5:00 pm

- 8:30 a.m. Housing Tax Credit Program Overview
- 9:00 a.m. HTC Rules and Regulations
- 9:30 a.m. Income and Rent Limits  
Calculating Income  
Sample Completed Forms with Calculations
- 12:00 noon LUNCH (Provided)
- 1:00 p.m. *Practice Exercise –  
Calculating Income Amounts*
- 1:45 p.m. Documenting Household Eligibility
- 2:15 p.m. *Practice Exercise – Applicant Eligibility*
- 3:15 p.m. Annual Recertifications
- 3:30 p.m. Telephone Clarifications
- 4:15 p.m. Tenant File Inspections and  
Noncompliance
- 4:45 p.m. Questions and Answers

For questions or assistance, e-mail or call:  
[juanitapekay@jankenhs.com](mailto:juanitapekay@jankenhs.com)  
(763) 226-1833

Breakfast, Snacks, and  
Lunch Provided!

7.5 Hours of MN Real Estate  
Continuing Education Approved!

## COURSE OVERVIEW

This Course provides the participant:

- an understanding of the importance of the Housing Tax Credit (HTC) program in developing affordable housing
- the information necessary to determine if households qualify for the HTC program
- the ability to gather the extensive tenant documentation required for the HTC program
- relevant Minnesota interpretations of the federal regulations!

After successfully completing this course, you will have the knowledge and tools to ensure HTC Compliance at your property.

Participant Comments:

*"Awesome training! Very thorough and helpful – will be taking more training from Juanita in the future."*

*This class gave a real overview of the tax credit meaning and process, as well as an explanation of the forms."*

*"I learned a lot, Juanita was awesome, and the food was seriously the best I have had for any type of conference!"*

## HTC BASICS DATES/LOCATIONS

March 20, 2013	Plymouth Crowne Plaza
June 19, 2013	Plymouth Crowne Plaza
September 19, 2013	Plymouth Crowne Plaza
December 11, 2013	Plymouth Crowne Plaza (formerly Radisson)

Registration form and map attached.

**DON'T FORGET TO BRING A CALCULATOR!**



# Low Income Housing Tax Credit (HTC) ASSETS/AUDITS

TRAINING PROVIDED BY:  
Janken Housing Solutions, Inc.  
7063 Terraceview Lane  
Maple Grove, MN 55311

**Instructor:** Juanita Pekay  
juanitapekay@jankenhs.com

## AGENDA

8:30 am to 5:00 pm

- 8:30 a.m. Recent Changes and Updated Forms
- 10:00 a.m. Strategies for Obtaining Verifications from Difficult Verifiers; Obtaining Second Party Verifications
- 10:30 a.m. Calculating Difficult Assets, including Pensions, 401(k)s, Real Estate
- 11:00 a.m. Calculating Difficult Income Sources, Including Employment and Pensions
- 12:00 noon LUNCH (Provided)
- 1:00 p.m. Monitoring Inspections – Preparing for File Audits
- 1:45 p.m. Correcting File Deficiencies and Noncompliance
- 2:30 p.m. *Practice Exercise – File Audit*
- 3:30 p.m. Monitoring Inspections – Preparing for Physical Inspections
- 4:00 p.m. Compliance During Extended Use Period
- 4:45 p.m. Questions and Answers

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[juanitapekay@jankenhs.com](mailto:juanitapekay@jankenhs.com)  
(763) 226-1833

Breakfast, Snacks, and  
Lunch Provided!

7.5 Hours of MN Real Estate  
Continuing Education Approved!

## COURSE OVERVIEW

This Course provides the participant:

- Recent HTC Changes and Updated Forms
- Information on calculating difficult income and asset sources
- Tools for preparing for file and physical inspections of HTC properties
- Practice auditing files

After successfully completing this course, you will have the knowledge and tools to calculate difficult income sources and prepare for monitoring inspections.

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Participant Comments:

*"Juanita's tips were very helpful in preparing for our audit by the state agency."*

*"I always reference your examples in the book if I have questions. It is very well done!"*

*"Juanita is extremely helpful and knowledgeable."*

## ASSETS/AUDITS COURSE DATES/LOCATIONS

June 20, 2013      Plymouth Crowne Plaza  
December 18, 2013      Plymouth Crowne Plaza  
   (formerly Radisson)

Registration form and map attached.

**DON'T FORGET TO BRING A CALCULATOR!**



# Low Income Housing Tax Credit (HTC) 2014 HTC CHANGES AND EXPERIENCED MANAGERS' SESSION

**TRAINING PROVIDED BY:**  
Janken Housing Solutions, Inc.  
7063 Terraceview Lane  
Maple Grove, MN 55311

**Instructor:** Juanita Pekay  
juanitapekay@jankenhs.com

## AGENDA

**8:30 am to 12:15 pm**

- |            |   |
|------------|---|
| 8:30 a.m.  | Recent Housing Tax Credit Changes;<br>New Compliance Manual & Forms                       |
| 9:30 a.m.  | Specific Agenda to be Determined Based<br>Upon Changes that Happen Throughout<br>the Year |
| 12:00 noon | Questions and Answers   |

## HALF DAY SESSION FOR EXPERIENCED MANAGERS!

**- ONLY \$130.00 -**

**Breakfast and Snacks Provided!**

*For questions or assistance, e-mail or call:*  
[juanitapekay@jankenhs.com](mailto:juanitapekay@jankenhs.com)  
(763) 226-1833

*3.75 Hours of MN Real Estate  
Continuing Education Applied For!*

## COURSE OVERVIEW

This Course provides the participant:

- Recent Housing Tax Credit Changes, New Compliance Manual and Forms
- Explanation of how changes to the "Multiple Building Election" over the last two years impact our properties
- Understanding of how to avoid 8823s by submitting complete annual reports and responding to monitoring reviews

After successfully completing this course, you will have the knowledge and tools to help owners make their choice of whether to include each building as part of a multiple building project, and understand how to avoid many 8823s!

## 2014 HTC CHANGES COURSE DATES/LOCATIONS

8:30 a.m. – 12:15 p.m.

December 12, 2013	Plymouth Crowne Plaza
December 19, 2013	Plymouth Crowne Plaza (formerly Radisson)

Registration form and map attached.



# Low Income Housing Tax Credit (HTC)

**TRAINING PROVIDED BY:**  
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## REGISTRATION FORM

**Instructor:** Juanita Pekay  
juanitapekay@jankenhs.com

Please submit registration form with a check for \$185 per person for full day courses (or \$130 per person for half day courses) payable to Janken Housing Solutions.  
*Registrations sent within 7 days of course date, please add \$25 late registration fee.)*

Organization: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City / State / Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ FAX: \_\_\_\_\_

*Please copy this form and use a Different Registration Form for Each Training Date.  
Please use a copy of this form for your accounting.*

Check one date per form submitted:

<input type="checkbox"/>	March 20, 2013 (Wed)	HTC Basics	Plymouth Crowne Plaza	\$185	
<input type="checkbox"/>	June 19, 2013 (Wed)	HTC Basics	Plymouth Crowne Plaza	\$185	
<input type="checkbox"/>	June 20, 2013 (Thurs)	HTC Assets/Audits	Plymouth Crowne Plaza	\$185	
<input type="checkbox"/>	September 19, 2013 (Thurs)	HTC Basics	Plymouth Crowne Plaza	\$185	
<input type="checkbox"/>	December 11, 2013 (Wed)	HTC Basics	Plymouth Crowne Plaza	\$185	
<input type="checkbox"/>	December 12, 2013 (Thurs)	2014 HTC Changes	Plymouth Crowne Plaza		\$130
<input type="checkbox"/>	December 18, 2013 (Wed)	HTC Assets/Audits	Plymouth Crowne Plaza	\$185	
<input type="checkbox"/>	December 19, 2013 (Thurs)	2014 HTC Changes	Plymouth Crowne Plaza		\$130

Name: \_\_\_\_\_ e-mail: \_\_\_\_\_

Name: \_\_\_\_\_ e-mail: \_\_\_\_\_

Name: \_\_\_\_\_ e-mail: \_\_\_\_\_

Name: \_\_\_\_\_ e-mail: \_\_\_\_\_

### Registrations Postmarked Within 7 Days of Training, add \$25.00/Person

**Mail with payment to:** Janken Housing Solutions, Inc.  
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E-Mail: juanitapekay@jankenhs.com

**PLEASE DO NOT FAX OR E-MAIL REGISTRATION -- PLEASE SEND FORM WITH PAYMENT**

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## LOCATION & MAP

Instructor: Juanita Pekay  
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### Plymouth Crowne Plaza

Crowne Plaza Hotel & Conference Center  
(formerly Radisson)  
3131 Campus Drive  
Plymouth, MN 55441  
Hotel Phone: (763) 559-6600

