



## Workshop Dates and Locations

All workshops are 8:30 a.m. – 4:30 p.m.

Registration starts at 8:00 a.m.

### ONTARIO

Tues/Wed February 9<sup>th</sup> & 10<sup>th</sup>, 2010

Holiday Inn Express  
2280 S. Haven Ave  
Ontario, CA 91761

### PASADENA

Thurs/Fri February 11<sup>th</sup> & 12<sup>th</sup>, 2010

Courtyard Pasadena/Monrovia  
700 West Huntington Dr  
Monrovia, CA 91016

### SAN DIEGO

Thurs/Fri February 25<sup>th</sup> & 26<sup>th</sup>, 2010

Courtyard Liberty Station  
2592 Laning Rd  
San Diego, CA 92106

### SACRAMENTO

Tues/Wed March 2<sup>nd</sup> & 3<sup>rd</sup>, 2010

Doubletree Hotel  
2001 Point West Way  
Sacramento, CA 95815

### WALNUT CREEK

Thurs/Fri March 4<sup>th</sup> & 5<sup>th</sup>, 2010

Walnut Creek Marriott  
2355 North Main Street  
Walnut Creek, CA 94596

### FRESNO

Mon/Tues March 22<sup>nd</sup> & 23<sup>rd</sup>, 2010

Piccadilly Inn Airport  
5115 East McKinley Ave  
Fresno, CA 93727

### REDDING

Thurs/Fri March 25<sup>th</sup> & 26<sup>th</sup>, 2010

Oxford Suites  
1967 Hilltop Dr  
Redding, CA 96002

## About the California Tax Credit Allocation Committee

The California Tax Credit Allocation Committee (CTCAC) is a state agency responsible for administering the Federal and State Low Income Housing Tax Credit Programs.

## Workshop Session Descriptions

### **Advanced Compliance Workshop:**

This workshop is designed to cover the major compliance changes to the LIHTC program with the enactment of HR 3221 (HERA) that go into effect in 2010, as well as the revisions to both the IRS 8823 Guide and HUD 4350.3

Topics include:

- 2010 Policy Memo
- Changes to the IRS 8823 Guide
- Changes to HUD 4350.3
- HERA legislation which affects Rent/Income limits for 7 counties in California
- Tenant Data Collection
- Q & A and distribution of participation certificates

*Affordable housing owners and management companies are invited to attend one of fourteen Low-Income Housing Tax Credit (LIHTC)*

*Compliance Monitoring workshops.*

*The California Tax Credit Allocation Committee (CTCAC) will be providing seven two-day workshops with the Day One focused on Advance Compliance issues and Day Two focused on Basic Compliance issues in various locations throughout the state.*

*The Advanced Compliance Workshop will focus on updated information on CTCAC monitoring policies, updates on how recent regulation changes (including HERA, HUD, and 8823 Guide) impact compliance monitoring and reporting.*

*The Basic Compliance Workshop is designed for on-site staff, and will detail income calculations, required forms, physical issues, insight into the CTCAC compliance process, and student scenarios.*



## Workshop Session Descriptions

(cont.)

### **Basic Compliance Workshop:**

This workshop is designed to cover the basics of a CTCAC inspection from pre-inspection requirements, income calculations, UPCS requirements, to post inspection findings. It will also include an exercise on Student Scenarios. Topics will include:

- Brief Overview of changes in 2010 CTCAC Policy
- Review of Required Forms
- In depth review of a CTCAC Inspection
- In depth review of the CTCAC Physical Site Inspection
- Review of noncompliance findings/correction period
- Review of CTCAC close out process and 8823 reporting
- Q & A and distribution of participation certificates

### Who should attend

Day One of the workshops will focus on major compliance changes that go into effect in 2010. As such it is geared to:

- Owners
- Directors of Compliance
- Regional Property Managers
- Asset Managers

Day Two of the workshops is a basic overview of compliance as it relates to the management of a property and the audit process. It is geared to:

- On-site Managers
- Compliance Specialists
- Support Staff

**Please Note:** Registration is for either the basic or the advanced workshop. At this time we are not able to accommodate persons who wish to attend both sessions.

### General Information

Walk-in registrations will NOT be accepted.

Space is limited to 2 representatives per organization for the Advanced Workshop and 3 representatives per organization for the Basic Workshop.

Full refunds will be made to registered participants if CTCAC cancels or postpones the workshop.

If you have any questions, please call Carol Douglas at (916) 654-0019.



## State of California **Tax Credit Allocation Committee**

### **2010** *LOW-INCOME HOUSING TAX CREDIT COMPLIANCE WORKSHOPS*

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**Ontario**  
*February 9<sup>th</sup> & 10<sup>th</sup>*

**Pasadena**  
*February 11<sup>th</sup> & 12<sup>th</sup>*

**San Diego**  
*February 25<sup>th</sup> & 26<sup>th</sup>*

**Sacramento**  
*March 2<sup>nd</sup> & 3<sup>rd</sup>*

**Walnut Creek**  
*March 4<sup>th</sup> & 5<sup>th</sup>*

**Fresno**  
*March 22<sup>nd</sup> & 23<sup>rd</sup>*

**Redding**  
*March 25<sup>th</sup> & 26<sup>th</sup>*

# State of California Tax Credit Allocation Committee 2010 Compliance Workshops

## Registration Form

### Ontario

Dates: Feb 9<sup>th</sup> & 10<sup>th</sup>  
Holiday Inn Express  
2280 S. Haven Ave  
Ontario, CA 91761  
Phone: (909) 930-5555

### Pasadena

Dates: Feb 11<sup>th</sup> & 12<sup>th</sup>  
Courtyard Pasadena/Monrovia  
700 West Huntington Dr  
Monrovia, CA 91016  
Phone: (626) 357-5211

### San Diego

Dates: Feb 25<sup>th</sup> & 26<sup>th</sup>  
Courtyard Liberty Station  
2592 Laning Rd  
San Diego, CA 92106  
Phone: (619) 221-1900

### Sacramento

Dates: March 2<sup>nd</sup> & 3<sup>rd</sup>  
Doubletree Hotel  
2001 Point West Way  
Sacramento, CA 95815  
Phone: (916) 929-8855

### Walnut Creek

Dates: March 4<sup>th</sup> & 5<sup>th</sup>  
Walnut Creek Marriott  
2355 North Main St  
Walnut Creek, CA 94596  
Phone: (925) 934-2000

### Fresno

Dates: March 22<sup>nd</sup> & 23<sup>rd</sup>  
Piccadilly Inn Airport  
5115 East McKinley Ave  
Fresno, CA 93727  
Phone: (559) 251-6000

### Redding

Dates: March 25<sup>th</sup> & 26<sup>th</sup>  
Oxford Suites  
1967 Hilltop Drive  
Redding, CA 96002  
Phone: (530) 221-0100

**Registration: \$65.00** per person. Registration deadline date is **January 22, 2010**, no forms and fees will be accepted after this date. **NO** faxed registration forms or walk-in registrations will be accepted. Make checks payable to TCAC. Emailed or faxed confirmation letters will be sent upon receipt of registration and payment.

### Advanced Compliance Workshops (Day One)

- Space is limited to **2\*** persons per organization, and a total number of **80** registrants\*\*. Registrations are made on a first come, first served basis when the form and payment are received. The Advanced Compliance Workshop is geared to\*\*:
  - **Property Owners**
  - **Regional Property Managers**
- **Directors of Compliance**
- **Asset Managers**

### Basic Compliance Workshop (Day Two)

- Space is limited to **3\*** persons per organization, and a total number of **100** registrants\*\*. Registrations are made on a first come, first served basis when the form and payment are received. The Basic Compliance Workshop is geared to:
  - **On-site Managers**
  - **New Compliance Staff**
  - **Compliance Specialists**

\* Please note each person may attend only 1 workshop (either the Advanced or Basic Workshop but not both)

\*\* The Redding Workshop will be limited to 35 people for Day One and 40 people for Day Two.

## ----- REGISTRATION FORM ----- (Please print clearly or type)

Organization: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_ Fax: \_\_\_\_\_  
Contact Person: \_\_\_\_\_ Contact e-mail: \_\_\_\_\_

### Day One (Advanced)

Name: \_\_\_\_\_  
Name: \_\_\_\_\_

### Day Two (Basic)

Name: \_\_\_\_\_  
Name: \_\_\_\_\_  
Name: \_\_\_\_\_

### Workshop:

\_\_\_\_\_ Ontario 2/8 & 2/9/09  
\_\_\_\_\_ San Diego 2/25 & 2/26/09  
\_\_\_\_\_ Walnut Creek 3/4 & 3/5/09  
\_\_\_\_\_ Redding 3/25 & 3/26/09

\_\_\_\_\_ Pasadena 2/10 & 2/11/09  
\_\_\_\_\_ Sacramento 3/2 & 3/3/09  
\_\_\_\_\_ Fresno 3/22 & 3/23/09

### Return Forms to:

**CTCAC**  
**915 Capitol Mall, Rm 485**  
**Sacramento, CA 95814**  
**Attn: Carol Douglas**