

Competitive LIHTC Application Review Two (Carryover) Submission Checklist

Please contact Sam Haile at 608.267.1087/e-mail: sam.haile@wheda.com with questions.

1. Prepare current year LIHTC application (Application Two)

- Update all information changed since application one.
- Examples: project name, project street address(es), ownership entity name registered with Wisconsin DFI, EIN number for ownership entity, project costs and credit calculation figures.
- Printouts generated at this stage are previews only – DO NOT submit print preview hard copy to WHEDA

2. Prepare Carryover Provision Request form(s)

- Available online in Tax Credit Allocating forms area:
<https://www.wheda.com/WorkArea/DownloadAsset.aspx?id=938>
- Owner address block to include ownership entity registered w/Wisconsin DFI with appropriate punctuation
- Taxpayer ID (EIN) for registered ownership entity
- Double check that item #10 on the form has been completed (10% test calculation)

3. Submit Application Two electronically via the LOLA system

- Final application & signature page appear after submission. **DO NOT** print before pressing "submit".
- Signature page: Type/print ownership entity name registered with DFI with all punctuation.
- Authorized signor: Add original signature (and date) to signature page.

4. Prepare paper copies of application materials

- Final printed application with original executed signature page.
- Carryover Provision Request form(s) – completed and signed.
- Photocopy materials for owner/applicant files

5. Complete "Credit Award Checklist"

- Available online in the tax Credit Allocating forms area:
<https://www.wheda.com/WorkArea/DownloadAsset.aspx?id=982>

6. Mail or deliver documentation (Items 1 – 5) to WHEDA

Via regular mail to:

Sam Haile
WHEDA
P.O. Box 1728
Madison WI 53701-1728

Via express mail to:

Sam Haile
WHEDA
201 West Washington Avenue, Suite 700
Madison WI 53703