

LIHTC Recertification, Documentation, & Recordkeeping and Monitoring & Reporting Compliance

Annual and interim re-certifications will be discussed in depth to include timing, unit transfers, waivers, and the 140% rule. Learn ways how to create and manage recordkeeping systems to accurately retain your files and documentation. This session will also go through the reporting requirements of State agencies, investor/syndicators. IRS forms 8609 and 8823 requirements will be reviewed. Compliance aspects of fair housing, accessibility and reasonable modification requests are included as well.

Instructor: Heather Staggs – STAR Momentum



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Heather brings knowledge from both the property management and regulatory sides of the affordable housing industry. She is a 25-year property management veteran; in addition, she has served as the previous manager for both the PBCA Section 8 Contract Administration and LIHTC Program Compliance departments within the Colorado Housing and Finance Authority (CHFA). Prior to that, she was a Project Manager with the U.S. Department of Housing and Urban Development. Heather is an expert in Fair Housing and affordable housing program compliance rules and regulations, allowing her to serve as an expert witness for a high profile Federal Fair Housing property management case. Heather has first-hand insight into the latest affordable housing compliance trends all due to her on-site consulting work with multiple affordable housing programs, in addition to her company reviewing over over 800 resident files on a monthly basis,. Her ability to comprehend the complex rules and regulations of the affordable housing industry, allows her to assist her clients across the country to stay compliant with not only state monitoring and government agencies, but also with Fair Housing laws. Heather is also a NAHMA approved CPO™ and FHC™ Instructor.