



---

Multifamily Finance Division  
P.O. Box 13941, Austin, Texas 78711-3941  
221 East 11<sup>th</sup> Street, Austin, TX 78701

Telephone: (512) 475-3340  
Facsimile: (512) 475-0764

---

### **2014 Post Bond Closure Submission**

**Instructions:** In accordance with §10.402(e) of the Uniform Multifamily Rules, no later than sixty (60) calendar days after closing on the bonds, regardless of the Bond Issuer, the Development Owner must submit:

1. A copy of the Determination Notice.
2. **Management Plan.** The Management Plan must clearly state the following and must be signed. The Owner is encouraged to read other requirements of property management as found in Chapter 10, Subchapter F of the Uniform Multifamily Rules (relating to Compliance Administration).
  - a. Prospective applicants who hold Section 8 vouchers or certificates are welcome to apply and will be provided the same consideration for occupancy as any other prospective tenant;
  - b. Any minimum income requirements for Section 8 voucher and certificate holders will only be applied to the portion of the rent the prospective tenant would pay, provided, however, that if Section 8 pays 100% of the rent for the unit, the housing sponsor may establish other reasonable minimum income requirements to establish other reasonable minimum income requirements to ensure that the tenant has the financial resources to meet daily living expenses. Minimum income requirements for Section 8 voucher and certificate holders will not exceed 2.5 times the portion of rent the tenant pays; and
  - c. All other screening criteria, including employment policies or procedures and other leasing criteria (such as rental history, credit history, criminal history, etc.) must be applied to the prospective tenants uniformly and in a manner consistent with the Texas and Federal Fair Housing Acts and with Department requirements.
3. **Affirmative Marketing Plan Form.** The Plan submitted should be the HUD Form 935.2a that is available at the following link which also includes instructions for completing the form: <http://portal.hud.gov/hudportal/documents/huddoc?id=935-2a.pdf>. If an alternative format for the Affirmative Marketing Plan is being submitted in lieu of the HUD form, then the information contained in the Plan must, at a minimum, contain all the information that is included in the HUD Form. In addition,

the Affirmative Marketing Plan must identify the methods used to market the property to persons with disabilities.

4. **Fair Housing Training.** The Development Owner or Management Company must submit evidence of attendance at a Department-approved Fair Housing training relating to leasing and management issues for at least five hours **and** the Development Architect or Engineer responsible for Fair Housing compliance for the Development must submit evidence of attendance at a Department-approved Fair Housing training relating to design issues for at least five hours, on or before the date the bonds are closed. Certifications must not be older than 2 years from the date of submission of these documents.
5. **Evidence of Closed Financing.** The Development Owner must submit evidence that the financing has closed. Such evidence can be in the form of an executed settlement statement.
6. **Agreement of Assignment and Assumption of LURA.** If the Development has an existing LURA with the Department, a fully executed and recorded Agreement of Assignment and Assumption of LURA (aka “Agreement to Comply”) must be submitted.
7. **Agreement & Election Statement.** The Development Owner may execute an Agreement and Election Statement for the purpose of fixing the Applicable Percentage with respect to a building or buildings for the month in which the bonds were closed as provided for in §42(b)(2) of the Code. The Development Owner must submit the executed Agreement and Election Statement with these documents, provided the Applicable Percentage was fixed. The Statement should be signed and notarized.

**Method of Submission:** These documents may be submitted via the Department’s FTP server, with the exception of the Agreement and Election Statement which the Department must receive an executed original. The Applicant is encouraged to send staff an email indicating that the documents have been uploaded.