



**NOTICE OF INTENT TO TRANSFER OWNERSHIP,  
OR CHANGE OWNER NAME OR STATUS**

*To be completed prior to transfer or title, change in partnership name, corporate name, or status. Final documentation to be supplied after closing.*

Project Name: \_\_\_\_\_ Project HTC #: \_\_\_\_\_

Legal name of project owner or ownership entity to whom credits were allocated:  
\_\_\_\_\_

Current Owner Federal Tax ID #: \_\_\_\_\_

Contact person name and phone #: \_\_\_\_\_

**Indicate Type of Change and Date:**

\_\_\_\_\_ Change in Owner Name/Status (Entity Type) \_\_\_\_\_ Anticipated/Actual Closing Date

\_\_\_\_\_ Sale of Property

\_\_\_\_\_ Transfer of Partnership Interest

**Property Programs:**

\_\_\_\_\_ LIHTC \_\_\_\_\_ Workforce Housing

\_\_\_\_\_ HOME\* \_\_\_\_\_ AHIT

\_\_\_\_\_ HTF \_\_\_\_\_ TCAP

\_\_\_\_\_ Project Based Section 8 \_\_\_\_\_ ICRC

\_\_\_\_\_ Other (Specify: \_\_\_\_\_)

(If any other program is checked in addition to LIHTC, please see Page 2)

When does your Compliance Regulator Period End? \_\_\_\_\_

If Federal Funds\* are involved, when does your Period of Affordability end? \_\_\_\_\_

**New or Updated Owner Information**

Name: \_\_\_\_\_ Tax ID #: \_\_\_\_\_

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

Contact Person Name, Phone Number, and Email: \_\_\_\_\_

**List All Partners:**

Name, Address, Phone, and Email	Percentage of Ownership	Tax ID or SSN
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Management Agent Information

Name of Management Company: \_\_\_\_\_

Tax ID #: \_\_\_\_\_

Address of Management Co: \_\_\_\_\_

Contact Person Name and Phone Number: \_\_\_\_\_

Attached is the following documentation (Attach all the apply.):

**For transfer of ownership and for change in partnership name/status**

- \_\_\_\_\_ Copy of the amended or new partnership agreement; or
- \_\_\_\_\_ Copy of the Articles of Incorporations and By-Laws; or
- \_\_\_\_\_ Copy of the LLP/LLC Organizational Documents; or
- \_\_\_\_\_ Copy of the Certificate of Good Standing from the Secretary of State not older than 90 days from the date of this notice, if applicable

You may be required to submit an attorney opinion letter. IHFA will notify you if this is a requirement.

**For all changes in ownership**

- \_\_\_\_\_ \$1,500.00 application Fee, plus actual costs incurred if such costs exceed the application fee
- \_\_\_\_\_ Additional \$500.00 if any Additional Program is checked on Page 1\*

All legal charges are the responsibility of Ownership Entity and will be paid at closing.

Idaho Housing and Finance Association reserves tax credits to the partnership and general partners. Reservations are not transferable. Any change in partner status requires Idaho Housing and Finance Association notification.

**Transferring Owner/Partner:**

**New Owner/Partner:**

\_\_\_\_\_  
Print Name of Transferring Entity:

\_\_\_\_\_  
Print Name of New Entity:

By: \_\_\_\_\_

By: \_\_\_\_\_

Its: \_\_\_\_\_

Its: \_\_\_\_\_

\_\_\_\_\_  
Print Name of Person Signing

\_\_\_\_\_  
Print Name of Person Signing

Date: \_\_\_\_\_

Date: \_\_\_\_\_

**Send completed forms and fee payment to:**  
**Idaho Housing and Finance, Compliance Department**  
**PO Box 9405, Boise ID 83707-1899**  
 or email forms to: [katiek@ihfa.org](mailto:katiek@ihfa.org)

### Management or Owner Change Required Documents for Tax Credit Properties

IHFA's Compliance Department will need to approve a change of the management companies. Please have the Owners of this development submit the required form, along with the following documents:

#### MANAGEMENT ONLY CHANGES

- IHFA Management Change form (located on IHFA website)
- Management Agreement
- Management Plan (specifically addressing how affordable units will be leased up)
- Previous Participation Certificate (list of all affordable properties in each state management company is operating)
- Corporate Resume (outlining the companies experience in managing multifamily developments, etc.)
- Proof of industry training for all on-site and compliance staff if proposed agent is new to Idaho and has no prior history of affordable housing management with IHFA
- Syndicator approval (only if property is in initial compliance period)

#### ONERSHIP or TRANSFER of PARTNER INTEREST CHANGES

- \$1,500 Fee to process change (approval will not be completed until fee is paid)
- IHFA Notice of Intent to Change Ownership Form (located on IHFA website)
- Draft Assignment and Assumption
- Title Report/Title Commitment

Management or Owner Change Required Documents for HOME Properties

IHFA's Compliance Department will need to approve the switch of the management companies. Please have the Owners of this development submit a formal letter addressed to the Compliance Department requesting the change and the reasons why, along with the following documents:

- Management Agreement
- Management Plan
- Lease Agreement and all attachments
- Waitlist/Tenant Selection Policy or Plan
- Affirmative Marketing Plan (AMP)
- Limited English Proficiency (LEP) Evaluation
- VAWA Addendum and Plan
- Title Report/Title Commitment

For Requests Related to Other Programs Other Than LIHTC

For any transfer, restructure, refinance or any other IHFA product that has been checked on page one, please email [multifamily@ihfa.org](mailto:multifamily@ihfa.org) with a detailed narrative of your request. IHFA will also need contact information for all parties involved as we will need to set up a ProCorem Workcenter for document upload.

For additional, and more detailed, information on changes and transfers, please see the most recent Administrative Plan on the Idaho Housing and Finance Association website.