

# Tab A:

Signed PDF of the Excel Application(MANDATORY)

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# 2024 Federal Low Income Housing Tax Credit Program

## Application For Reservation

### Deadline for Submission

#### 9% Competitive Credits

Applications Must Be Received At Virginia Housing No Later Than **12:00 PM** Richmond, VA Time On **March 14, 2024**

#### Tax Exempt Bonds

Applications must be received at Virginia Housing No Later Than 12:00 PM Richmond, VA Time for one of the two available 4% credit rounds- January 25, 2024 or July 18, 2024.



Virginia Housing  
601 South Belvidere Street  
Richmond, Virginia 23220-6500

## INSTRUCTIONS FOR THE VIRGINIA 2024 LIHTC APPLICATION FOR RESERVATION

This application was prepared using Excel, Microsoft Office 2016. Please note that using the active Excel workbook does not eliminate the need to submit the required PDF of the signed hardcopy of the application and related documentation. A more detailed explanation of application submission requirements is provided below and in the Application Manual.

**An electronic copy of your completed application is a mandatory submission item.**

### Applications For 9% Competitive Credits

Applicants should submit an electronic copy of the application package prior to the application deadline, which is **12:00 PM** Richmond Virginia time on **March 14, 2024**. Failure to submit an electronic copy of the application by the deadline will cause the application to be disqualified.

### **Please Note:**

**Applicants should submit all application materials in electronic format only via your specific Procorem workcenter.**

There should be distinct files which should include the following:

1. Application For Reservation – the active Microsoft Excel workbook
2. A PDF file which includes the following:
  - Application For Reservation – Signed version of hardcopy
  - All application attachments (i.e. tab documents, excluding market study and plans & specs)
3. Market Study – PDF or Microsoft Word format
4. Plans - PDF or other readable electronic format
5. Specifications - PDF or other readable electronic format (may be combined into the same file as the plans if necessary)
6. Unit-By-Unit work write up (rehab only) - PDF or other readable electronic format
7. Developer Experience Documentation (PDF)

### **IMPORTANT:**

**Virginia Housing only accepts files via our work center sites on Procorem. Contact [TaxCreditApps@virginiahousing.com](mailto:TaxCreditApps@virginiahousing.com) for access to Procorem or for the creation of a new deal workcenter. Do not submit any application materials to any email address unless specifically requested by the Virginia Housing LIHTC Allocation Department staff.**

### Disclaimer:

Virginia Housing assumes no responsibility for any problems incurred in using this spreadsheet or for the accuracy of calculations. Check your application for correctness and completeness before submitting the application to Virginia Housing.

### Entering Data:

Enter numbers or text as appropriate in the blank spaces highlighted in yellow. Cells have been formatted as appropriate for the data expected. All other cells are protected and will not allow changes.

### **Please Note:**

- ▶ **VERY IMPORTANT! : Do not** use the copy/cut/paste functions within this document. Pasting fields will corrupt the application and may result in penalties. You may use links to other cells or other documents but do not paste data from one document or field to another. You may also use the drag function.
- ▶ Some fields provide a dropdown of options to select from, indicated by a down arrow that appears when the cell is selected. Click on the arrow to select a value within the dropdown for these fields.
- ▶ The spreadsheet contains multiple error checks to assist in identifying potential mistakes in the application. These may appear as data is entered but are dependent on values entered later in the application. Do not be concerned with these messages until all data within the application has been entered.
- ▶ Also note that some cells contain error messages such as “#DIV/0!” as you begin. These warnings will disappear as the numbers necessary for the calculation are entered.

### Assistance:

If you have any questions, please contact the Virginia Housing LIHTC Allocation Department. Please note that we cannot release the copy protection password.

### Virginia Housing LIHTC Allocation Staff Contact Information

Name	Email	Phone Number
Stephanie Flanders	<a href="mailto:stephanie.flanders@virginiahousing.com">stephanie.flanders@virginiahousing.com</a>	(804) 343-5939
Jonathan Kinsey	<a href="mailto:jonathan.kinsey@virginiahousing.com">jonathan.kinsey@virginiahousing.com</a>	(804) 584-4717
Phil Cunningham	<a href="mailto:phillip.cunningham@virginiahousing.com">phillip.cunningham@virginiahousing.com</a>	(804) 343-5514
Lauren Dillard	<a href="mailto:lauren.dillard@virginiahousing.com">lauren.dillard@virginiahousing.com</a>	(804) 584-4729
Jaki Whitehead	<a href="mailto:jaki.whitehead@virginiahousing.com">jaki.whitehead@virginiahousing.com</a>	(804) 343-5861
Hadia Ali	<a href="mailto:hadia.ali@virginiahousing.com">hadia.ali@virginiahousing.com</a>	(804) 343-5873

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## 2024 Low-Income Housing Tax Credit Application For Reservation

Please indicate if the following items are included with your application by putting an 'X' in the appropriate boxes. Your assistance in organizing the submission in the following order, and actually using tabs to mark them as shown, will facilitate review of your application. Please note that all mandatory items must be included for the application to be processed. The inclusion of other items may increase the number of points for which you are eligible under Virginia Housing's point system of ranking applications, and may assist Virginia Housing in its determination of the appropriate amount of credits that may be reserved for the development.

<input checked="" type="checkbox"/>	\$1,000 Application Fee <b>(MANDATORY)</b> - Invoice information will be provided in your Procorem Workcenter
<input checked="" type="checkbox"/>	Electronic Copy of the Microsoft Excel Based Application <b>(MANDATORY)</b>
<input checked="" type="checkbox"/>	Scanned Copy of the <u>Signed</u> Tax Credit Application with Attachments (excluding market study, 8609s and plans & specifications) <b>(MANDATORY)</b>
<input checked="" type="checkbox"/>	Electronic Copy of the Market Study <b>(MANDATORY - Application will be disqualified if study is not submitted with application)</b>
<input checked="" type="checkbox"/>	Electronic Copy of the Plans <b>(MANDATORY)</b>
<input checked="" type="checkbox"/>	Electronic Copy of the Specifications <b>(MANDATORY)</b>
<input type="checkbox"/>	Electronic Copy of the Existing Condition questionnaire <b>(MANDATORY if Rehab)</b>
<input type="checkbox"/>	Electronic Copy of Unit by Unit Matrix and Scope of Work narrative <b>(MANDATORY if Rehab)</b>
<input type="checkbox"/>	Electronic Copy of the Physical Needs Assessment <b>(MANDATORY at reservation for a 4% rehab request)</b>
<input checked="" type="checkbox"/>	Electronic Copy of Appraisal <b>(MANDATORY if acquisition credits requested)</b>
<input checked="" type="checkbox"/>	Electronic Copy of Environmental Site Assessment (Phase I) <b>(MANDATORY if 4% credits requested)</b>
<input checked="" type="checkbox"/>	Electronic Copy of Development Experience and Partnership or Operating Agreement, including chart of ownership structure with percentage of interests <b>(MANDATORY)</b>
<input checked="" type="checkbox"/>	Tab A: Partnership or Operating Agreement, including chart of ownership structure with percentage of interests (see manual for details) <b>(MANDATORY)</b>
<input checked="" type="checkbox"/>	Tab B: Virginia State Corporation Commission Certification <b>(MANDATORY)</b>
<input checked="" type="checkbox"/>	Tab C: Principal's Previous Participation Certification <b>(MANDATORY)</b>
<input checked="" type="checkbox"/>	Tab D: List of LIHTC Developments (Schedule A) <b>(MANDATORY)</b>
<input checked="" type="checkbox"/>	Tab E: Site Control Documentation & Most Recent Real Estate Tax Assessment <b>(MANDATORY)</b>
<input checked="" type="checkbox"/>	Tab F: Third Party RESNET Rater Certification <b>(MANDATORY)</b>
<input checked="" type="checkbox"/>	Tab G: Zoning Certification Letter <b>(MANDATORY)</b>
<input checked="" type="checkbox"/>	Tab H: Attorney's Opinion using Virginia Housing template <b>(MANDATORY)</b>
<input type="checkbox"/>	Tab I: Nonprofit Questionnaire <b>(MANDATORY for points or pool)</b>
	The following documents need not be submitted unless requested by Virginia Housing:
	-Nonprofit Articles of Incorporation      -IRS Documentation of Nonprofit Status
	-Joint Venture Agreement (if applicable)      -For-profit Consulting Agreement (if applicable)
<input type="checkbox"/>	Tab J: Relocation Plan and Unit Delivery Schedule <b>(MANDATORY if Rehab)</b>
<input type="checkbox"/>	Tab K: Documentation of Development Location:
<input checked="" type="checkbox"/>	K.1 Revitalization Area Certification
<input checked="" type="checkbox"/>	K.2 Surveyor's Certification of Proximity To Public Transportation using Virginia Housing template
<input checked="" type="checkbox"/>	Tab L: PHA / Section 8 Notification Letter
<input type="checkbox"/>	Tab M: <i>(left intentionally blank)</i>
<input type="checkbox"/>	Tab N: Homeownership Plan
<input type="checkbox"/>	Tab O: Plan of Development Certification Letter
<input type="checkbox"/>	Tab P: Zero Energy or Passive House documentation for prior allocation by this developer
<input type="checkbox"/>	Tab Q: Documentation of Rental Assistance, Tax Abatement and/or existing RD or HUD Property
<input checked="" type="checkbox"/>	Tab R: Documentation of Utility Allowance Calculation
<input type="checkbox"/>	Tab S: Supportive Housing Certification and/or Resident Well-being MOU
<input type="checkbox"/>	Tab T: Funding Documentation
<input checked="" type="checkbox"/>	Tab U: Acknowledgement by Tenant of the availability of Renter Education provided by Virginia Housing
<input type="checkbox"/>	Tab V: Nonprofit or LHA Purchase Option or Right of First Refusal
<input checked="" type="checkbox"/>	Tab W: Internet Safety Plan and Resident Information Form
<input type="checkbox"/>	Tab X: Marketing Plan for units meeting accessibility requirements of HUD section 504
<input type="checkbox"/>	Tab Y: Inducement Resolution for Tax Exempt Bonds
<input type="checkbox"/>	Tab Z: Documentation of team member's Diversity, Equity and Inclusion Designation
<input type="checkbox"/>	Tab AA: Priority Letter from Rural Development
<input type="checkbox"/>	Tab AB: Social Disadvantage Certification

VHDA TRACKING NUMBER

2024-FEB-14

## A. GENERAL INFORMATION ABOUT PROPOSED DEVELOPMENT

Application Date:

1/25/2024

1. Development Name: Somos Phase B
2. Address (line 1): 1750 Old Meadow Rd  
Address (line 2):   
City: McLean State: VA Zip: 22102
3. If complete address is not available, provide longitude and latitude coordinates (x,y) from a location on site that your surveyor deems appropriate. Longitude: 00.00000 Latitude: 00.00000  
(Only necessary if street address or street intersections are not available.)
4. The Circuit Court Clerk's office in which the deed to the development is or will be recorded:  
City/County of Fairfax County
5. The site overlaps one or more jurisdictional boundaries..... FALSE  
If true, what other City/County is the site located in besides response to #4?.....
6. Development is located in the census tract of: 4712.01
7. Development is located in a **Qualified Census Tract**..... FALSE *Note regarding DDA and QCT*
8. Development is located in a **Difficult Development Area**..... FALSE
9. Development is located in a **Revitalization Area based on QCT** ..... FALSE
10. Development is located in a **Revitalization Area designated by resolution** ..... TRUE
11. Development is located in an **Opportunity Zone** (with a binding commitment for funding)..... FALSE  
(If 9, 10 or 11 are True, **Action:** Provide required form in **TAB K1**)
12. Development is located in a census tract with a household poverty rate of.....
- | 3%          | 10%          | 12%          |
|-------------|--------------|--------------|
| <u>TRUE</u> | <u>FALSE</u> | <u>FALSE</u> |

Enter only Numeric Values below:

13. Congressional District: 11  
Planning District: 8  
State Senate District: 32  
State House District: 35

14. Development Description: In the space provided below, give a brief description of the proposed development

Located walking distance to the McLean Metro Station in Fairfax County. Somos Phase B will be new construction of 225 units of affordable multifamily housing.

VHDA TRACKING NUMBER

2024-TEB-14

A. GENERAL INFORMATION ABOUT PROPOSED DEVELOPMENT

Application Date:

1/25/2024

15. Local Needs and Support

- a. Provide the name and the address of the chief executive officer (City Manager, Town Manager, or County Administrator of the political jurisdiction in which the development will be located:

Chief Executive Officer's Name:	Jeffrey C. McKay		
Chief Executive Officer's Title:	Chairman of the Board of Supervisors	Phone:	703-324-2321
Street Address:	12000 Government Center Parkway		
City:	Fairfax	State:	VA
		Zip:	22035

Name and title of local official you have discussed this project with who could answer questions for the local CEO:

Thomas E. Fleetwood

- b. If the development overlaps another jurisdiction, please fill in the following:

Chief Executive Officer's Name:			
Chief Executive Officer's Title:		Phone:	
Street Address:			
City:		State:	
		Zip:	

Name and title of local official you have discussed this project with who could answer questions for the local CEO:

B. RESERVATION REQUEST INFORMATION

1. Requesting Credits From:

- a. If requesting 9% Credits, select credit pool:
- or
- b. If requesting Tax Exempt Bond credits, select development type:

New Construction
- For Tax Exempt Bonds, where are bonds being issued?

Virginia Housing
- ACTION: Provide Inducement Resolution at TAB Y (if available)
- Skip to Number 4 below.

2. Type(s) of Allocation/Allocation Year

- Definitions of types:
- a.

Regular Allocation means all of the buildings in the development are expected to be placed in service this calendar year, 2024.
- b.

Carryforward Allocation means all of the buildings in the development are expected to be placed in service within two years after the end of this calendar year, 2024, but the owner will have more than 10% basis in development before the end of twelve months following allocation of credits. For those buildings, the owner requests a carryforward allocation of 2024 credits pursuant to Section 42(h)(1)(E).

3. Select Building Allocation type:

New Construction

**Note** regarding Type = Acquisition and Rehabilitation: Even if you acquired a building this year and "placed it in service" for the purpose of the acquisition credit, you cannot receive its acquisition 8609 form until the rehab 8609 is issued for that building.

4. Is this an additional allocation for a development that has buildings not yet placed in service? .....

FALSE

5. Planned Combined 9% and 4% Developments

- a. A site plan has been submitted with this application indicating two developments on the same or contiguous site. One development relates to this 9% allocation request and the remaining development will be a 4% tax exempt bond application.

FALSE

If true, provide name of companion development:

- a. Has the developer met with Virginia Housing regarding the 4% tax exempt bond deal?

TRUE
- b. List below the number of units planned for each allocation request. This stated split of units cannot be changed or 9% Credits will be cancelled.
- Total Units within 9% allocation request?

0
- Total Units within 4% Tax Exempt allocation Request?

0
- Total Units:

0
- % of units in 4% Tax Exempt Allocation Request:

0.00%

6. Extended Use Restriction

**Note:** Each recipient of an allocation of credits will be required to record an **Extended Use Agreement** as required by the IRC governing the use of the development for low-income housing for at least 30 years. Applicant waives the right to pursue a Qualified Contract.

Must Select One: 30

Definition of selection:

Development will be subject to the standard extended use agreement of 15 extended use period (after the mandatory 15-year compliance period.)

7. Virginia Housing would like to encourage the efficiency of electronic payments. Indicate if developer commits to submitting any payments due the Authority, including reservation fees and monitoring fees, by electronic payment.

TRUE

*In 2023, Virginia Housing began using a new Rental Housing Invoicing Portal to allow easy payments via secure ACH transactions. An invoice for your application fee along with access information was provided in your development's assigned Procorem work center.*

## C. OWNERSHIP INFORMATION

NOTE: Virginia Housing may allocate credits only to the tax-paying entity which owns the development at the time of the allocation. The term "Owner" herein refers to that entity. Please fill in the legal name of the owner. The ownership entity must be formed prior to submitting this application. Any transfer, direct or indirect, of partnership interests (except those involving the admission of limited partners) prior to the placed-in-service date of the proposed development shall be prohibited, unless the transfer is consented to by Virginia Housing in its sole discretion. **IMPORTANT: The Owner name listed on this page must exactly match the owner name listed on the Virginia State Corporation Commission Certification.**

## 1. Owner Information:

*Must be an individual or legally formed entity.*

a. Owner Name: Somos Phase B, LLC

Developer Name: SCG Development Partners, LLC

Contact: M/M ▶ Mr. First: Stephen MI: P Last: Wilson

Address: 8245 Boone Blvd., Suite 640

City: Tysons Corner St. ▶ VA Zip: 22182

Phone: (703) 942-6610 Ext.  Fax:

Email address: SPW@scgdevelopment.com

Federal I.D. No. 934088915 (If not available, obtain prior to Carryover Allocation.)

Select type of entity: ▶ Limited Liability Company Formation State: ▶ VA

Additional Contact: Please Provide Name, Email and Phone number.

Jennifer Schneider, JLS@scgdevelopment.com, 703-942-6610

- ACTION:**
- a. Provide Owner's organizational documents (e.g. Partnership agreements and Developer Fee agreement) **(Mandatory TAB A)**
  - b. Provide Certification from Virginia State Corporation Commission **(Mandatory TAB B)**
  - c. Provide Principals' Previous Participation Certification **(Mandatory TAB C)**
  - d. Provide a chart of ownership structure (Org Chart) and a list of all LIHTC Developments within the last 15 years. **(Mandatory at TABS A/D)**

- b. FALSE Indicate if at least one principal listed within Org Chart with an ownership interest of at least 25% in the controlling general partner or managing member is a socially disadvantaged individual as defined in the manual.

**ACTION:** If true, provide Socially Disadvantaged Certification **(TAB AB)**

## 2. Developer Experience:

*May select one or more of the following choices:*

- FALSE a. The development has an experienced sponsor (as defined in the manual) that has placed at least one LIHTC development in service in Virginia within the past 5 years.  
**Action:** Provide one 8609 from qualifying development.

- TRUE b. The development has an experienced sponsor (as defined in the manual) that has placed at least three (3) LIHTC developments in service in any state within the past 6 years (in addition to any development provided to qualify for option d. above)  
**Action:** Provide one 8609 from each qualifying development.

- FALSE c. Applicant is competing in the Local Housing Authority pool and partnering with an experienced sponsor (as defined in the manual), other than a local housing authority.  
**Action:** Provide documentation as stated in the manual.

**D. SITE CONTROL**

**NOTE:** Site control by the Owner identified herein is a mandatory precondition of review of this application. Documentary evidence in the form of either a deed, option, purchase contract or lease for a term longer than the period of time the property will be subject to occupancy restrictions must be included herewith. (For 9% Competitive Credits - An option or contract must extend beyond the application deadline by a minimum of four months.)

**Warning:** Site control by an entity other than the Owner, even if it is a closely related party, is not sufficient. Anticipated future transfers to the Owner are not sufficient. The Owner, as identified previously, must have site control at the time this Application is submitted.

**NOTE:** If the Owner receives a reservation of credits, the property must be titled in the name of or leased by (pursuant to a long-term lease) the Owner before the allocation of credits is made.

Contact Virginia Housing before submitting this application if there are any questions about this requirement.

**1. Type of Site Control by Owner:**

Applicant controls site by (select one):

Select Type: ☒ Option

Expiration Date: 12/1/2025

In the Option or Purchase contract - Any contract for the acquisition of a site with an existing residential property may not require an empty building as a condition of such contract, unless relocation assistance is provided to displaced households, if any, at such level required by Virginia Housing. See QAP for further details.

**ACTION:** Provide documentation and most recent real estate tax assessment - **Mandatory TAB E**

☒ FALSE ..... There is more than one site for development and more than one form of site control.

(If **True**, provide documentation for each site specifying number of existing buildings on the site (if any), type of control of each site, and applicable expiration date of stated site control. A site control document is required for each site (**Tab E**.)

**2. Timing of Acquisition by Owner:**

Only one of the following statement should be True.

a. ☒ FALSE ..... Owner already controls site by either deed or long-term lease.

b. ☒ TRUE ..... Owner is to acquire property by deed (or lease for period no shorter than period property will be subject to occupancy restrictions) no later than..... 12/1/2025 .

c. ☒ FALSE ..... There is more than one site for development and more than one expected date of acquisition by Owner.

(If c is **True**, provide documentation for each site specifying number of existing buildings on the site, if any, and expected date of acquisition of each site by Owner (**Tab E**.)

D. SITE CONTROL

3. Seller Information:

Name:

Fairfax County Redevelopment and Housing Authority

Address:

3700 Pender Drive, Suite 100

City:

Fairfax

St.:

VA

Zip:

22030

Contact Person:

Thomas E. Fleetwood

Phone:

(703) 246-5280

There is an identity of interest between the seller and the owner/applicant.....

FALSE

If above statement is **TRUE**, complete the following:

Principal(s) involved (e.g. general partners, controlling shareholders, etc.)

Names	Phone	Type Ownership	% Ownership
			0.00%
			0.00%
			0.00%
			0.00%
			0.00%
			0.00%
			0.00%

**E. DEVELOPMENT TEAM INFORMATION**

**Complete the following as applicable to your development team.**

- Indicate Diversity, Equity and Inclusion (DEI) Designation if this team member is SWAM or Service Disabled Veteran as defined in manual.

**ACTION:** Provide copy of certification from Commonwealth of Virginia, if applicable - **TAB Z**

1. Tax Attorney:	Erik Hoffman	This is a Related Entity.	FALSE
Firm Name:	Klein Horning LLP	DEI Designation?	FALSE
Address:	1325 G St NW, Suite 770, Washington, DC 20005		
Email:	Ehoffman@kleinhorning.com	Phone:	(202) 926-3404
2. Tax Accountant:	Ashley Bell, CPA	This is a Related Entity.	FALSE
Firm Name:	SC&H Group	DEI Designation?	FALSE
Address:	7900 Westpark Drive, Suite A150, Tysons Corner, VA 21102		
Email:	abell@schgroup.com	Phone:	(410) 339-7250
3. Consultant:	Ryne Johnson	This is a Related Entity.	FALSE
Firm Name:	Astoria, LLC	DEI Designation?	FALSE
Address:	3450 Lady Marian Ct., Midlothian, VA 23113	Role:	Application Consultant
Email:	RyneJohnson@astoriallc.com	Phone:	(804) 339-7250
4. Management Entity:	Jan Haub	This is a Related Entity.	FALSE
Firm Name:	Paradigm Management II, LP	DEI Designation?	FALSE
Address:	1515 North Courthouse Road, Suite 600, Arlington, VA 22201		
Email:	jhaub@paradigmcos.com	Phone:	(571) 482-5922
5. Contractor:	David Kuncheff	This is a Related Entity.	FALSE
Firm Name:	James G. Davis Construction Corporation	DEI Designation?	FALSE
Address:	12530 Parklawn Drive, Rockville, MD 20852		
Email:	dkuncheff@davisconstruction.com	Phone:	(301) 255-2130
6. Architect:	Joseph S. Saville	This is a Related Entity.	FALSE
Firm Name:	Davis, Carter, Scott, Ltd.	DEI Designation?	FALSE
Address:	8614 Westwood Center Drive, Suite 800, Tysons, VA 22182		
Email:	ssaville@dcsdesign.com	Phone:	(703) 556-9275
7. Real Estate Attorney:	Erik Hoffman	This is a Related Entity.	FALSE
Firm Name:	Klein Horning LLP	DEI Designation?	FALSE
Address:	1325 G St NW, Suite 770, Washington, DC 20005		
Email:	Ehoffman@kleinhorning.com	Phone:	(202) 926-3404
8. Mortgage Banker:	Ryne Johnson	This is a Related Entity.	FALSE
Firm Name:	Astoria, LLC	DEI Designation?	FALSE
Address:	3450 Lady Marian Ct., Midlothian, VA 23113		
Email:	RyneJohnson@astoriallc.com	Phone:	(804) 339-7250
9. Other:		This is a Related Entity.	FALSE
Firm Name:		DEI Designation?	FALSE
Address:		Role:	
Email:		Phone:	



**F. REHAB INFORMATION****1. Acquisition Credit Information**

- a. Credits are being requested for existing buildings being acquired for development..... **FALSE**

**Action:** If true, provide an electronic copy of the Existing Condition Questionnaire, Unit by Unit Matrix and Appraisal.

- b. This development has received a previous allocation of credits..... **FALSE**  
If so, when was the most recent year that this development received credits? .... **0**

- c. The development has been provided an acknowledgement letter from Rural Development regarding its preservation priority?..... **FALSE**

- d. This development is an existing RD or HUD S8/236 development..... **FALSE**

**Action:** (If True, provide required form in **TAB Q**)

Note: If there is an identity of interest between the applicant and the seller in this proposal, and the applicant is seeking points in this category, then the applicant must either waive their rights to the developer's fee or other fees associated with acquisition, or obtain a waiver of this requirement from Virginia Housing prior to application submission to receive these points.

- i. Applicant agrees to waive all rights to any developer's fee or other fees associated with acquisition..... **FALSE**

- ii. Applicant has obtained a waiver of this requirement from Virginia Housing prior to the application submission deadline..... **FALSE**

**2. Ten-Year Rule For Acquisition Credits**

- a. All buildings satisfy the 10-year look-back rule of IRC Section 42 (d)(2)(B), including the 10% basis/\$15,000 rehab costs (\$10,000 for Tax Exempt Bonds) per unit requirement..... **FALSE**

- b. All buildings qualify for an exception to the 10-year rule under IRC Section 42(d)(2)(D)(i),..... **FALSE**

- i. Subsection (I)..... **FALSE**

- ii. Subsection (II)..... **FALSE**

- iii. Subsection (III)..... **FALSE**

- iv. Subsection (IV)..... **FALSE**

- v. Subsection (V)..... **FALSE**

- c. The 10-year rule in IRC Section 42 (d)(2)(B) for all buildings does not apply pursuant to IRC Section 42(d)(6)..... **FALSE**

- d. There are different circumstances for different buildings..... **FALSE**

**Action:** (If True, provide an explanation for each building in Tab K)

F. REHAB INFORMATION

3. Rehabilitation Credit Information

- a. Credits are being requested for rehabilitation expenditures..... FALSE
- b. Minimum Expenditure Requirements
  - i. All buildings in the development satisfy the rehab costs per unit requirement of IRS Section 42(e)(3)(A)(ii)..... FALSE
  - ii. All buildings in the development qualify for the IRC Section 42(e)(3)(B) exception to the 10% basis requirement (4% credit only)..... FALSE
  - iii. All buildings in the development qualify for the IRC Section 42(f)(5)(B)(ii)(II) exception..... FALSE
  - iv. There are different circumstances for different buildings..... FALSE  
Action: (If True, provide an explanation for each building in Tab K)

**G. NONPROFIT INVOLVEMENT**

**Applications for 9% Credits** - Section 1 must be completed in order to compete in the Non Profit tax credit pool.

**All Applicants** - Section 2 must be completed to obtain points for nonprofit involvement.

- 1. Tax Credit Nonprofit Pool Applicants:** To qualify for the nonprofit pool, an organization (described in IRC Section 501(c)(3) or 501(c)(4) and exempt from taxation under IRC Section 501(a)) should answer the following questions as TRUE:

- |              |    |   |
|--------------|----|---|
| <u>FALSE</u> | a. | Be authorized to do business in Virginia.   |
| <u>FALSE</u> | b. | Be substantially based or active in the community of the development.   |
| <u>FALSE</u> | c. | Materially participate in the development and operation of the development throughout the compliance period (i.e., regular, continuous and substantial involvement) in the operation of the development throughout the Compliance Period. |
| <u>FALSE</u> | d. | Own, either directly or through a partnership or limited liability company, 100% of the general partnership or managing member interest.  |
| <u>FALSE</u> | e. | Not be affiliated with or controlled by a for-profit organization.  |
| <u>FALSE</u> | f. | Not have been formed for the principal purpose of competition in the Non Profit Pool.   |
| <u>FALSE</u> | g. | Not have any staff member, officer or member of the board of directors materially participate, directly or indirectly, in the proposed development as a for profit entity.  |

- 2. All Applicants:** To qualify for points under the ranking system, the nonprofit's involvement need not necessarily satisfy all of the requirements for participation in the nonprofit tax credit pool.

**A. Nonprofit Involvement (All Applicants)**

There is nonprofit involvement in this development..... FALSE (If false, skip to #3.)

**Action:** If there is nonprofit involvement, provide completed Non Profit Questionnaire (**Mandatory TAB I**).

**B. Type of involvement:**

Nonprofit meets eligibility requirement for points only, not pool..... FALSE

**or**

Nonprofit meets eligibility requirements for nonprofit pool and points..... FALSE

**C. Identity of Nonprofit (All nonprofit applicants):**

The nonprofit organization involved in this development is: ▶

Name:

Contact Person:

Street Address:

City:

State: ▶

Zip:

Phone:

Contact Email:

G. NONPROFIT INVOLVEMENT

D. Percentage of Nonprofit Ownership (All nonprofit applicants):  
Specify the nonprofit entity's percentage ownership of the general partnership interest: 0.0%

3. Nonprofit/Local Housing Authority Purchase Option/Right of First Refusal

A. FALSE After the mandatory 15-year compliance period, a qualified nonprofit or local housing authority will have the option to purchase or the right of first refusal to acquire the development for a price not to exceed the outstanding debt and exit taxes. Such debt must be limited to the original mortgage(s) unless any refinancing is approved by the nonprofit. See manual for more specifics.

Action: Provide Option or Right of First Refusal in recordable form using Virginia Housing's template. (TAB V)  
Provide Nonprofit Questionnaire (if applicable) (TAB I)

Name of qualified nonprofit:

or indicate true if Local Housing Authority..... FALSE  
Name of Local Housing Authority

B. FALSE A qualified nonprofit or local housing authority submits a homeownership plan committing to sell the units in the development after the mandatory 15-year compliance period to tenants whose incomes shall not exceed the applicable income limit at the time of their initial occupancy.

Action: Provide Homeownership Plan (TAB N) and contact Virginia Housing for a Pre-Application M

NOTE: Applicant is required to waive the right to pursue a Qualified Contract.

**H. STRUCTURE AND UNITS INFORMATION****1. General Information**

a. Total number of <b>all</b> units in development	225	bedrooms	422
Total number of <b>rental</b> units in development	225	bedrooms	422
Number of low-income rental units	225	bedrooms	422
Percentage of rental units designated low-income	100.00%		
b. Number of new units:.....	225	bedrooms	422
Number of adaptive reuse units: .....	0	bedrooms	0
Number of rehab units:.....	0	bedrooms	0
c. If any, indicate number of planned exempt units (included in total of all units in development).....			0
d. Total Floor Area For The Entire Development.....	264,475.18		(Sq. ft.)
e. Unheated Floor Area (i.e. Breezeways, Balconies, Storage).....	8,032.49		(Sq. ft.)
f. Nonresidential Commercial Floor Area (Not eligible for funding).....	0.00		
g. Total Usable Residential Heated Area.....	256,442.69		(Sq. ft.)
h. Percentage of Net Rentable Square Feet Deemed To Be <b>New Rental Space</b> .....	100.00%		
i. Exact area of site in acres .....	2.262		
j. Locality has approved a final site plan or plan of development.....	FALSE		
If <b>True</b> , Provide required documentation ( <b>TAB O</b> ).			
k. Requirement as of 2016: Site must be properly zoned for proposed development.	<b>ACTION:</b> Provide required zoning documentation ( <b>MANDATORY TAB G</b> )		
l. Development is eligible for Historic Rehab credits.....	FALSE		

**Definition:**

The structure is historic, by virtue of being listed individually in the National Register of Historic Places, or due to its location in a registered historic district and certified by the Secretary of the Interior as being of historical significance to the district, and the rehabilitation will be completed in such a manner as to be eligible for historic rehabilitation tax credits.

**H. STRUCTURE AND UNITS INFORMATION****2. UNIT MIX**

a. Specify the **average size and number per unit type** (as indicated in the Architect's Certification):

<i>Note: Average sq foot should include the prorata of common space.</i>	Unit Type	Average Sq Foot		# of LIHTC Units	Total Rental Units
	Supportive Housing	0.00	SF	0	0
	1 Story Eff - Elderly	0.00	SF	0	0
	1 Story 1BR - Elderly	0.00	SF	0	0
	1 Story 2BR - Elderly	0.00	SF	0	0
	Eff - Elderly	0.00	SF	0	0
	1BR Elderly	0.00	SF	0	0
	2BR Elderly	0.00	SF	0	0
	Eff - Garden	524.53	SF	7	7
	1BR Garden	621.59	SF	40	40
	2BR Garden	948.41	SF	152	152
	3BR Garden	1252.38	SF	26	26
	4BR Garden	0.00	SF	0	0
	2+ Story 2BR Townhouse	0.00	SF	0	0
	2+ Story 3BR Townhouse	0.00	SF	0	0
	2+ Story 4BR Townhouse	0.00	SF	0	0
				225	225

**Note:** Please be sure to enter the values in the appropriate unit category. If not, errors will occur on the self scoresheet.

**3. Structures**

a. Number of Buildings (containing rental units)..... **1**

b. Age of Structure:..... **0** years

c. Maximum Number of stories:..... **8**

d. The development is a scattered site development..... **FALSE**

e. Commercial Area Intended Use: .....

f. Development consists primarily of : **(Only One Option Below Can Be True)**

i. Low Rise Building(s) - (1-5 stories with any structural elements made of wood).....

**FALSE**

ii. Mid Rise Building(s) - (5-7 stories with no structural elements made of wood).....

**FALSE**

iii. High Rise Building(s) - (8 or more stories with no structural elements made of wood).....

**TRUE**

g. Indicate **True** for all development's structural features that apply:

i. Row House/Townhouse

**FALSE**

v. Detached Single-family

**FALSE**

ii. Garden Apartments

**FALSE**

vi. Detached Two-family

**FALSE**

iii. Slab on Grade

**FALSE**

vii. Basement

**FALSE**

iv. Crawl space

**FALSE**

h. Development contains an elevator(s).

**TRUE**

If true, # of Elevators.

**3**

Elevator Type (if known)

**Traction machine roomless**

**H. STRUCTURE AND UNITS INFORMATION**

- |                            |   |                     |
|----------------------------|---|---------------------|
| i. Roof Type               | ▶ | Flat                |
| j. Construction Type       | ▶ | Combination         |
| k. Primary Exterior Finish | ▶ | Fiber Cement Siding |

**4. Site Amenities (indicate all proposed)**

- |                              |       |                         |       |
|------------------------------|-------|-------------------------|-------|
| a. Business Center.....      | TRUE  | f. Limited Access.....  | TRUE  |
| b. Covered Parking.....      | FALSE | g. Playground.....      | TRUE  |
| c. Exercise Room.....        | TRUE  | h. Pool.....            | FALSE |
| d. Gated access to Site..... | FALSE | i. Rental Office.....   | TRUE  |
| e. Laundry facilities.....   | FALSE | j. Sports Activity Ct.. | FALSE |
|                              |       | k. Other:               |       |

- |                                   |   |
|-----------------------------------|---|
| l. Describe Community Facilities: | Club room, leasing office, multipurpose, library, conf & meeting room |
|-----------------------------------|---|

- |                                       |      |
|---------------------------------------|------|
| m. Number of Proposed Parking Spaces  | 203  |
| Parking is shared with another entity | TRUE |

- |  |      |
|--|------|
| n. Development located within 1/2 mile of an existing commuter rail, light rail or subway station or 1/4 mile from existing public bus stop. | TRUE |
|--|------|

If **True**, Provide required documentation (**TAB K2**).

**5. Plans and Specifications**

- a. **Minimum submission requirements for all properties (new construction, rehabilitation and adaptive reuse):**

- i. A location map with development clearly defined.
- ii. Sketch plan of the site showing overall dimensions of all building(s), major site elements (e.g., parking lots and location of existing utilities, and water, sewer, electric, gas in the streets adjacent to the site). Contour lines and elevations are not required.
- iii. Sketch plans of all building(s) reflecting overall dimensions of:
  - a. Typical floor plan(s) showing apartment types and placement
  - b. Ground floor plan(s) showing common areas
  - c. Sketch floor plan(s) of typical dwelling unit(s)
  - d. Typical wall section(s) showing footing, foundation, wall and floor structure
 Notes must indicate basic materials in structure, floor and exterior finish.

- b. The following are due at reservation for Tax Exempt 4% Applications and at allocation for 9% Applications.

- i. Phase I environmental assessment.
- ii. Physical needs assessment for any rehab only development.

**NOTE:** All developments must meet Virginia Housing's **Minimum Design and Construction Requirements**. By signing and submitting the Application for Reservation of LIHTC, the applicant certifies that the proposed project budget, plans & specifications and work write-ups incorporate all necessary elements to fulfill these requirements.

J. ENHANCEMENTS

Each development must meet the following baseline energy performance standard applicable to the development's construction category.

- a. **New Construction:** must obtain EnergyStar certification.
- b. **Rehabilitation:** renovation must result in at least a 30% performance increase or score an 80 or lower on the HERS Index.
- c. **Adaptive Reuse:** must score a 95 or lower on the HERS Index.

Certification and HERS Index score must be verified by a third-party, independent, non-affiliated, certified RESNET home energy rater. The HERS re[prt should be completed for the whole development and not an individual unit.

Indicate **True** for the following items that apply to the proposed development:

- ACTION:** Provide RESNET rater certification of Development Plans (**TAB F**)
- ACTION:** Provide Internet Safety Plan and Resident Information Form (**Tab W**) if corresponding options selected below.

REQUIRED:

1. For any development, upon completion of construction/rehabilitation:

FALSE	a. A community/meeting room with a minimum of 749 square feet is provided with free WIFI access restricted to residents only.
40.00%	b1. Percentage of brick covering the exterior walls.
50.00%	b2. Percentage of Fiber Cement Board or other similar low-maintenance material approved by the Authority covering exterior walls. Community buildings are to be included in percentage calculations.
TRUE	c. Water expense is sub-metered (the tenant will pay monthly or bi-monthly bill).
FALSE	d. All faucets, toilets and showerheads in each bathroom are WaterSense labeled products.
FALSE	e. Rehab Only: Each unit is provided with the necessary infrastructure for high-speed internet/broadband service.
	f. <i>Not applicable for 2024 Cycles</i>
FALSE	g. Each unit is provided free individual broadband/high speed internet access.
or	(both access point categories have a minimum upload/download speed per manual.)
FALSE	h. Each unit is provided free individual WiFi access.
FALSE	i. Full bath fans are wired to primary light with delayed timer or has continuous exhaust by ERV/DOAS.
or	
FALSE	j. Full bath fans are equipped with a humidistat.
FALSE	k. Cooking surfaces are equipped with fire prevention features as defined in the manual
or	
FALSE	l. Cooking surfaces are equipped with fire suppression features as defined in the manual
FALSE	m. Rehab only: Each unit has dedicated space, drain and electrical hook-ups to accept a permanently installed dehumidification system.
or	
FALSE	n. All Construction types: each unit is equipped with a permanent dehumidification system.
FALSE	o. All interior doors within units are solid core.
FALSE	p. Every kitchen, living room and bedroom contains, at minimum, one USB charging port.
FALSE	q. All kitchen light fixtures are LED and meet MDCR lighting guidelines.
0%	r. Percentage of development's on-site electrical load that can be met by a renewable energy electric system (for the benefit of the tenants) - Provide documentation at <b>Tab F</b> .
FALSE	s. New construction only: Each unit to have balcony or patio with a minimum depth of 5 feet clear



J. ENHANCEMENTS

from face of building and a minimum size of 30 square feet.

For all developments exclusively serving elderly tenants upon completion of construction/rehabilitation:

- FALSE

a. All cooking ranges have front controls.
- FALSE

b. Bathrooms have an independent or supplemental heat source.
- FALSE

c. All entrance doors have two eye viewers, one at 42" inches and the other at standard height.
- FALSE

d. Each unit has a shelf or ledge outside the primary entry door located in an interior hallway.

2. Green Certification

- a. Applicant agrees to meet the base line energy performance standard applicable to the development's construction category as listed above.

The applicant will also obtain one of the following:

- TRUE

Earthcraft Gold or higher certification
- FALSE

National Green Building Standard (NGBS) certification of Silver or higher.
- FALSE

LEED Certification
- FALSE

Enterprise Green Communities (EGC) Certification

Action: If seeking any points associated Green certification, provide appropriate documentation at **TAB F**.

- b. Applicant will pursue one of the following certifications to be awarded points on a future development application. (Failure to reach this goal will not result in a penalty.)

- FALSE

Zero Energy Ready Home Requirements
- FALSE

Passive House Standards
- FALSE

Applicant wishes to claim points from a prior allocation that has received certification for Zero Energy Ready or Passive House Standards. Provide certification at **Tab P**. See Manual for details and requirements.

3. Universal Design - Units Meeting Universal Design Standards (units must be shown on Plans)

- FALSE

a. Architect of record certifies that units will be constructed to meet Virginia Housing's Universal Design Standards.
- 0

b. Number of Rental Units constructed to meet Virginia Housing's Universal Design standards:

0% of Total Rental Units

4. 

TRUE

 Market-rate units' amenities are substantially equivalent to those of the low income units.

If not, please explain:



Architect of Record initial here that the above information is accurate per certification statement within this application.

I. UTILITIES

1. Utilities Types:

- a. Heating Type

Heat Pump
- b. Cooking Type

Electric
- c. AC Type

Central Air
- d. Hot Water Type

Electric

2. Indicate True if the following services will be included in Rent:

- Water?

FALSE

Heat?

FALSE
- Hot Water?

FALSE

AC?

FALSE
- Lighting/ Electric?

FALSE

Sewer?

FALSE
- Cooking?

FALSE

Trash Removal?

TRUE

Utilities	Enter Allowances by Bedroom Size				
	0-BR	1-BR	2-BR	3-BR	4-BR
Heating	11	14	17	20	0
Air Conditioning	5	7	8	9	0
Cooking	4	6	7	8	0
Lighting	18	23	28	32	0
Hot Water	10	13	16	19	0
Water	13	15	20	26	0
Sewer	32	38	49	61	0
Trash	0	0	0	0	0
Total utility allowance for costs paid by tenant	\$93	\$116	\$146	\$176	\$0

3. The following sources were used for Utility Allowance Calculation (Provide documentation **TAB R**).

- a. FALSE

HUD

d. FALSE

Local PHA
- b. FALSE

Utility Company (Estimate)

e. TRUE

Other: Viridiant UA Assessment
- c. FALSE

Utility Company (Actual Survey)

**Warning:** The Virginia Housing housing choice voucher program utility schedule shown on VirginiaHousing.com should not be used unless directed to do so by the local housing authority.

**K. SPECIAL HOUSING NEEDS**

**NOTE:** Any Applicant commits to providing first preference to members of targeted populations having state rental assistance and will not impose any eligibility requirements or lease terms for such individuals that are more restrictive than its standard requirements and terms, the terms of the MOU establishing the target population, or the eligibility requirements for the state rental assistance.

1. **Accessibility:** Indicate **True** for the following point categories, as appropriate.

**Action:** Provide appropriate documentation (**Tab X**)

**FALSE**

a. Any development in which (i) the greater of 5 units or 10% of total units will be assisted by HUD project-based vouchers (as evidenced by the submission of a letter satisfactory to the Authority from an authorized public housing authority (PHA) that the development meets all prerequisites for such assistance), or another form of documented and binding federal project-based rent subsidies in order to ensure occupancy by extremely low-income persons. Locality project based rental subsidy meets the definition of state project based rental subsidy;

(ii) will conform to HUD regulations interpreting the accessibility requirements of section 504 of the Rehabilitation Act; and be actively marketed to persons with disabilities as defined in the Fair Housing Act in accordance with a plan submitted as part of the application for credits.

(iii) above must include roll-in showers, roll under sinks and front control ranges, unless agreed to by the Authority prior to the applicant's submission of its application.

Documentation from source of assistance must be provided with the application.

**Note:** Subsidies may apply to any units, not only those built to satisfy Section 504.

**FALSE**

b. Any development in which ten percent (10%) of the total units (i) conform to HUD regulations interpreting the accessibility requirements of section 504 of the Rehabilitation Act and (ii) are actively marketed to persons with disabilities as defined in the Fair Housing Act in accordance with a plan submitted as part of the application for credits.

**For items a or b, all common space must also conform to HUD regulations interpreting the accessibility requirements of section 504 of the Rehabilitation Act.**



Architect of Record initial here that the above information is accurate per certification statement within this application.

2. **Special Housing Needs/Leasing Preference:**

a. If not general population, select applicable special population:

**FALSE**

Elderly (as defined by the United States Fair Housing Act.)

**FALSE**

Persons with Disabilities (must meet the requirements of the Federal Americans with Disabilities Act) - Accessible Supportive Housing Pool only

**FALSE**

Supportive Housing (as described in the Tax Credit Manual)

If Supportive Housing is True: Will the supportive housing consist of units designated for tenants that are homeless or at risk of homelessness?

**FALSE**

**Action:** Provide Permanent Supportive Housing Certification (**Tab S**)

**K. SPECIAL HOUSING NEEDS**

b. The development has existing tenants and a relocation plan has been developed..... **FALSE**

(If **True**, Virginia Housing policy requires that the impact of economic and/or physical displacement on those tenants be minimized, in which Owners agree to abide by the Authority's Relocation Guidelines for LIHTC properties.)

**Action:** Provide Relocation Plan, Budget and Unit Delivery Schedule **(Mandatory if tenants are displaced - Tab J)**

**3. Leasing Preferences**

a. Will leasing preference be given to applicants on a public housing waiting list and/or Section 8 waiting list? select: **Yes**

Organization which holds waiting list: **Fairfax County Redevelopment and Housing Authority**

Contact person: **Thomas Fleetwood**

Title: **Director**

Phone Number: **(703) 246-5280**

**Action:** Provide required notification documentation **(TAB L)**

b. Leasing preference will be given to individuals and families with children..... **FALSE**

(Less than or equal to 20% of the units must have of 1 or less bedrooms).

c. Specify the number of low-income units that will serve individuals and families with children by providing three or more bedrooms: **26**  
 % of total Low Income Units **12%**

**NOTE:** Development must utilize a **Virginia Housing Certified Management Agent**. Proof of management certification must be provided before 8609s are issued.

[Download Current CMA List from VirginiaHousing.com](https://www.virginiahousing.com/Download-Current-CMA-List-from-VirginiaHousing.com)

**Action:** Provide documentation of tenant disclosure regarding Virginia Housing Rental Education **(Mandatory - Tab U)**

**4. Target Population Leasing Preference**

Unless prohibited by an applicable federal subsidy program, each applicant shall commit to provide a leasing preference to individuals (i) in a target population identified in a memorandum of understanding between the Authority and one or more participating agencies of the Commonwealth, (ii) having a voucher or other binding commitment for rental assistance from the Commonwealth, and (iii) referred to the development by a referring agent approved by the Authority. The leasing preference shall not be applied to more than ten percent (10%) of the total units in the development at any given time. The applicant may not impose tenant selection criteria or leasing terms with respect to individuals receiving this preference that are more restrictive than the applicant's tenant selection criteria or leasing terms applicable to prospective tenants in the development that do not receive this preference, the eligibility criteria for the rental assistance from the Commonwealth, or any eligibility criteria contained in a memorandum of understanding between the Authority and one or more participating agencies of the Commonwealth.

**Primary Contact for Target Population leasing preference.** The agency will contact as needed.

First Name: **Jan**

Last Name: **Haub**

Phone Number: **(571) 482-5922**

Email: **jhaub@paradigmcos.com**

**K. SPECIAL HOUSING NEEDS****5. Resident Well-Being (as defined in the manual)****Action:** Provide appropriate documentation for any selection below (**Tab S**)

- FALSE a. Development has entered into a memorandum of understanding (approved by DBHDS) with a resident service provider for the provision of resident services.
- FALSE b. Development will provide licensed childcare on-site with a preference and discount to residents or an equivalent subsidy for tenants to utilize licensed childcare of tenant's choice.
- FALSE c. Development will provide tenants with free on-call, telephonic or virtual healthcare services with a licensed provider.

**6. Rental Assistance**

- a. Some of the low-income units do or will receive rental assistance..... FALSE

- b. Indicate True if rental assistance will be available from the following

FALSE Rental Assistance Demonstration (RAD) or other PHA conversion to project based rental assistance.

FALSE Section 8 New Construction Substantial Rehabilitation

FALSE Section 8 Moderate Rehabilitation

FALSE Section 811 Certificates

FALSE Section 8 Project Based Assistance

FALSE RD 515 Rental Assistance

FALSE Section 8 Vouchers

\*Administering Organization: \_\_\_\_\_

FALSE State Assistance

\*Administering Organization: \_\_\_\_\_

FALSE Other: \_\_\_\_\_

- c. The Project Based vouchers above are applicable to the 30% units seeking points.

FALSE

- i. If True above, how many of the 30% units will not have project based vouchers?

0

- d. Number of units receiving assistance:

0

How many years in rental assistance contract?

Expiration date of contract:

There is an Option to Renew.....

FALSE

**Action:** Contract or other agreement provided (**TAB Q**).

**7. Public Housing Revitalization**

Is this development replacing or revitalizing Public Housing Units?

FALSE

If so, how many existing Public Housing units?

0

**L. UNIT DETAILS****1. Set-Aside Election:****UNITS SELECTED IN INCOME AND RENT DETERMINE POINTS FOR THE BONUS POINT CATEGORY**

Note: In order to qualify for any tax credits, a development must meet one of three minimum threshold occupancy tests. Either (i) at least 20% of the units must be rent-restricted and occupied by persons whose incomes are 50% or less of the area median income adjusted for family size (this is called the 20/50 test), (ii) at least 40% of the units must be rent-restricted and occupied by persons whose incomes are 60% or less of the area median income adjusted for family size (this is called the 40/60 test), or (iii) 40% or more of the units are both rent-restricted and occupied by persons whose income does not exceed the imputed income limitation designated in 10% increments between 20% to 80% of the AMI, and the average of the imputed income limitations collectively does not exceed 60% of the AMI (this is called the Average Income Test (AIT)). All occupancy tests are described in Section 42 of the IRC. Rent-and income-restricted units are known as low-income units. If you have more low-income units than required, you qualify for more credits. If you serve lower incomes than required, you receive more points under the ranking system.

**a. Units Provided Per Household Type:**

Income Levels		
# of Units	% of Units	
0	0.00%	20% Area Median
0	0.00%	30% Area Median
0	0.00%	40% Area Median
53	23.56%	50% Area Median
120	53.33%	60% Area Median
52	23.11%	70% Area Median
0	0.00%	80% Area Median
0	0.00%	Market Units
225	100.00%	<b>Total</b>

Rent Levels		
# of Units	% of Units	
0	0.00%	20% Area Median
0	0.00%	30% Area Median
0	0.00%	40% Area Median
53	23.56%	50% Area Median
120	53.33%	60% Area Median
52	23.11%	70% Area Median
0	0.00%	80% Area Median
0	0.00%	Market Units
225	100.00%	<b>Total</b>


- b. Indicate that you are electing to receive points for the following deeper targets shown in the chart above and those targets will be reflected in the set-aside requirements within the Extended Use Agreement.

20-30% Levels ☐ FALSE 40% Levels ☐ FALSE 50% levels ☒ TRUE

- c. The development plans to utilize average income testing..... ☒ TRUE

**2. Unit Mix Grid****FOR YOUR CONVENIENCE, COPY AND PASTE IS ALLOWED WITHIN UNIT MIX GRID**

In the following grid, add a row for each unique unit type planned within the development. Enter the appropriate data for both tax credit and market rate units.

 Architect of Record initial here that the information below is accurate per certification statement within this application.

	Unit Type (Select One)	Rent Target (Select One)	Number of Units	# of Units 504 compliant	Net Rentable Square Feet	Monthly Rent Per Unit	Total Monthly Rent
Mix 1	1 BR - 1 Bath	50% AMI	10		545.34	\$1,297.20	\$12,972
Mix 2	1 BR - 1 Bath	60% AMI	10		545.34	\$1,579.20	\$15,792
Mix 3	1 BR - 1 Bath	60% AMI	6		544.29	\$1,579.20	\$9,475
Mix 4	1 BR - 1 Bath	60% AMI	1		542.30	\$1,579.20	\$1,579
Mix 5	1 BR - 1 Bath	70% AMI	6		584.84	\$1,862.20	\$11,173
Mix 6	1 BR - 1 Bath	60% AMI	5		603.86	\$1,579.20	\$7,896
Mix 7	1 BR - 1 Bath	60% AMI	2	2	602.76	\$1,579.20	\$3,158
Mix 8	2 BR - 2 Bath	50% AMI	30		845.74	\$1,550.30	\$46,509
Mix 9	2 BR - 2 Bath	60% AMI	8		836.03	\$1,889.30	\$15,114

L. UNIT DETAILS

Mix 10	2 BR - 2 Bath	60% AMI	6		829.27	\$1,889.30	\$11,336
Mix 11	2 BR - 2 Bath	60% AMI	7		843.39	\$1,889.30	\$13,225
Mix 12	2 BR - 2 Bath	60% AMI	28		828.95	\$1,889.30	\$52,900
Mix 13	2 BR - 2 Bath	60% AMI	11		832.16	\$1,889.30	\$20,782
Mix 14	2 BR - 2 Bath	60% AMI	1		1041.08	\$1,889.30	\$1,889
Mix 15	2 BR - 2 Bath	60% AMI	8		1009.54	\$1,889.30	\$15,114
Mix 16	2 BR - 2 Bath	60% AMI	8		1093.03	\$1,889.30	\$15,114
Mix 17	2 BR - 2 Bath	60% AMI	6		941.12	\$1,889.30	\$11,336
Mix 18	2 BR - 2 Bath	60% AMI	6		932.85	\$1,889.30	\$11,336
Mix 19	2 BR - 2 Bath	70% AMI	1		706.82	\$2,228.30	\$2,228
Mix 20	2 BR - 2 Bath	70% AMI	7		843.85	\$2,228.30	\$15,598
Mix 21	2 BR - 2 Bath	70% AMI	7		835.51	\$2,228.30	\$15,598
Mix 22	2 BR - 2 Bath	70% AMI	7	7	835.29	\$2,228.30	\$15,598
Mix 23	2 BR - 2 Bath	70% AMI	1	1	893.11	\$2,228.30	\$2,228
Mix 24	2 BR - 2 Bath	70% AMI	8		893.11	\$2,228.30	\$17,826
Mix 25	2 BR - 2 Bath	70% AMI	2		757.91	\$2,228.30	\$4,457
Mix 26	3 BR - 2 Bath	50% AMI	1	1	1189.38	\$1,783.37	\$1,783
Mix 27	3 BR - 2 Bath	50% AMI	7		1179.13	\$1,783.37	\$12,484
Mix 28	3 BR - 2 Bath	70% AMI	7		1147.65	\$2,567.37	\$17,972
Mix 29	3 BR - 2 Bath	50% AMI	5		1188.99	\$1,783.37	\$8,917
Mix 30	3 BR - 2 Bath	70% AMI	6		1156.43	\$2,567.37	\$15,404
Mix 31	Efficiency	60% AMI	6		471.80	\$1,488.53	\$8,931
Mix 32	Efficiency	60% AMI	1	1	472.40	\$1,488.53	\$1,489
Mix 33							\$0
Mix 34							\$0
Mix 35							\$0
Mix 36							\$0
Mix 37							\$0
Mix 38							\$0
Mix 39							\$0
Mix 40							\$0
Mix 41							\$0
Mix 42							\$0
Mix 43							\$0
Mix 44							\$0
Mix 45							\$0
Mix 46							\$0
Mix 47							\$0
Mix 48							\$0
Mix 49							\$0
Mix 50							\$0
Mix 51							\$0
Mix 52							\$0
Mix 53							\$0
Mix 54							\$0
Mix 55							\$0
Mix 56							\$0
Mix 57							\$0
Mix 58							\$0
Mix 59							\$0
Mix 60							\$0
Mix 61							\$0
Mix 62							\$0
Mix 63							\$0
Mix 64							\$0
Mix 65							\$0

L. UNIT DETAILS

Mix 66								\$0
Mix 67								\$0
Mix 68								\$0
Mix 69								\$0
Mix 70								\$0
Mix 71								\$0
Mix 72								\$0
Mix 73								\$0
Mix 74								\$0
Mix 75								\$0
Mix 76								\$0
Mix 77								\$0
Mix 78								\$0
Mix 79								\$0
Mix 80								\$0
Mix 81								\$0
Mix 82								\$0
Mix 83								\$0
Mix 84								\$0
Mix 85								\$0
Mix 86								\$0
Mix 87								\$0
Mix 88								\$0
Mix 89								\$0
Mix 90								\$0
Mix 91								\$0
Mix 92								\$0
Mix 93								\$0
Mix 94								\$0
Mix 95								\$0
Mix 96								\$0
Mix 97								\$0
Mix 98								\$0
Mix 99								\$0
Mix 100								\$0
TOTALS			225	12				\$417,216

Total Units	225	Net Rentable SF:	TC Units	188,385.06
			MKT Units	0.00
			Total NR SF:	188,385.06

Floor Space Fraction (to 7 decimals)	100.00000%
--------------------------------------	------------



**M. OPERATING EXPENSES****Administrative:**

Use Whole Numbers Only!

1. Advertising/Marketing			\$44,115
2. Office Salaries			\$326,771
3. Office Supplies			\$2,961
4. Office/Model Apartment	(type		
5. Management Fee			\$153,178
3.09% of EGI	\$680.79	Per Unit	
6. Manager Salaries			
7. Staff Unit (s)	(type		
8. Legal			\$1,776
9. Auditing			\$22,204
10. Bookkeeping/Accounting Fees			
11. Telephone & Answering Service			\$8,408
12. Tax Credit Monitoring Fee			\$10,396
13. Miscellaneous Administrative			\$54,216
<b>Total Administrative</b>			<b>\$624,025</b>

**Utilities**

14. Fuel Oil			
15. Electricity			\$79,367
16. Water			\$5,329
17. Gas			\$22,944
18. Sewer			\$11,102
<b>Total Utility</b>			<b>\$118,742</b>

**Operating:**

19. Janitor/Cleaning Payroll			
20. Janitor/Cleaning Supplies			
21. Janitor/Cleaning Contract			\$95,970
22. Exterminating			\$4,095
23. Trash Removal			\$42,039
24. Security Payroll/Contract			\$13,125
25. Grounds Payroll			
26. Grounds Supplies			
27. Grounds Contract			\$15,913
28. Maintenance/Repairs Payroll			
29. Repairs/Material			
30. Repairs Contract			\$25,076
31. Elevator Maintenance/Contract			\$29,359
32. Heating/Cooling Repairs & Maintenance			\$9,375
33. Pool Maintenance/Contract/Staff			
34. Snow Removal			\$4,688
35. Decorating/Payroll/Contract			\$58,374
36. Decorating Supplies			
37. Miscellaneous			\$1,240
<b>Totals Operating &amp; Maintenance</b>			<b>\$299,254</b>

**M. OPERATING EXPENSES****Taxes & Insurance**

38. Real Estate Taxes		\$652,470
39. Payroll Taxes		
40. Miscellaneous Taxes/Licenses/Permits		
41. Property & Liability Insurance	\$643 per unit	\$144,675
42. Fidelity Bond		
43. Workman's Compensation		
44. Health Insurance & Employee Benefits		\$67,124
45. Other Insurance		
<b>Total Taxes &amp; Insurance</b>		<b>\$864,269</b>

**Total Operating Expense****\$1,906,291**

<b>Total Operating Expenses Per Unit</b>	<b>\$8,472</b>	<b>C. Total Operating Expenses as % of EGI</b>	<b>38.45%</b>
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<b>Replacement Reserves (Total # Units X \$300 or \$250 New Const./Elderly Minimum)</b>	<b>\$67,500</b>
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<b>Total Expenses</b>	<b>\$1,973,791</b>
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N. PROJECT SCHEDULE

ACTIVITY	ACTUAL OR ANTICIPATED DATE	NAME OF RESPONSIBLE PERSON
<b>1. SITE</b>		
a. Option/Contract	12/21/2022	Stephen Wilson
b. Site Acquisition	2/28/2024	Stephen Wilson
c. Zoning Approval	11/10/2022	Jennifer Schneider
d. Site Plan Approval	12/22/2023	Jennifer Schneider
<b>2. Financing</b>		
<b>a. Construction Loan</b>		
i. Loan Application	5/1/2024	Jennifer Schneider
ii. Conditional Commitment	8/15/2024	Jennifer Schneider
iii. Firm Commitment	9/6/2024	Jennifer Schneider
<b>b. Permanent Loan - First Lien</b>		
i. Loan Application	5/1/2024	Jennifer Schneider
ii. Conditional Commitment	8/15/2024	Jennifer Schneider
iii. Firm Commitment	9/6/2024	Jennifer Schneider
<b>c. Permanent Loan-Second Lien</b>		
i. Loan Application	6/14/2021	Charles Margolis
ii. Conditional Commitment	10/1/2021	Charles Margolis
iii. Firm Commitment	3/10/2023	Charles Margolis
<b>d. Other Loans &amp; Grants</b>		
i. Type & Source, List	Housing Blueprint	FCRHA
ii. Application	10/15/2023	Jennifer Schneider
iii. Award/Commitment	1/31/2023	FCRHA
<b>2. Formation of Owner</b>	10/25/2023	Stephen Wilson
<b>3. IRS Approval of Nonprofit Status</b>	n/a	n/a
<b>4. Closing and Transfer of Property to Owner</b>	10/24/2024	Stephen Wilson
<b>5. Plans and Specifications, Working Drawings</b>	12/29/2023	Jennifer Schneider
<b>6. Building Permit Issued by Local Government</b>	3/15/2024	Jennifer Schneider
<b>7. Start Construction</b>	9/25/2024	Jennifer Schneider
<b>8. Begin Lease-up</b>	9/25/2026	Jennifer Schneider
<b>9. Complete Construction</b>	9/25/2026	Jennifer Schneider
<b>10. Complete Lease-Up</b>	5/25/2027	Jennifer Schneider
<b>11. Credit Placed in Service Date</b>	9/25/2026	Jennifer Schneider

O. PROJECT BUDGET - HARD COSTS

Cost/Basis/Maximum Allowable Credit

Complete cost column and basis column(s) as appropriate

To select exclusion of allowable line items from Total Development Costs used in Cost limit calculations, select X in yellow box to the left.

Note: Attorney must opine, among other things, as to correctness of the inclusion of each cost item in eligible basis, type of credit and numerical calculations included in Project Budget.

Must Use Whole Numbers Only!		Amount of Cost up to 100% Includable in Eligible Basis--Use Applicable Column(s):		
Item	(A) Cost	"30% Present Value Credit"		(D)
		(B) Acquisition	(C) Rehab/ New Construction	"70 % Present Value Credit"
1. Contractor Cost				
a. Unit Structures (New)	62,973,963	0	61,857,356	0
b. Unit Structures (Rehab)	0	0	0	0
c. Non Residential Structures	0	0	0	0
d. Commercial Space Costs	0	0	0	0
e. Structured Parking Garage	0	0	0	0
Total Structure	62,973,963	0	61,857,356	0
f. Earthwork	0	0	0	0
g. Site Utilities	0	0	0	0
h. Renewable Energy	0	0	0	0
i. Roads & Walks	0	0	0	0
j. Site Improvements	0	0	0	0
k. Lawns & Planting	0	0	0	0
l. Engineering	0	0	0	0
m. Off-Site Improvements	0	0	0	0
n. Site Environmental Mitigation	0	0	0	0
o. Demolition	0	0	0	0
p. Site Work	2,973,414	0	2,923,414	0
q. Other Site work	0	0	0	0
Total Land Improvements	2,973,414	0	2,923,414	0
Total Structure and Land	65,947,377	0	64,780,770	0
r. General Requirements	3,754,126	0	3,754,126	0
s. Builder's Overhead	1,837,920	0	1,828,788	0
( 2.8% Contract)				
t. Builder's Profit	3,130,870	0	3,117,880	0
( 4.7% Contract)				
u. Bonds	245,868	0	241,047	0
v. Building Permits	0	0	0	0
w. Special Construction	0	0	0	0
x. Special Equipment	0	0	0	0
y. Other 1:	0	0	0	0
z. Other 2:	0	0	0	0
aa. Other 3:	0	0	0	0
Contractor Costs	\$74,916,161	\$0	\$73,722,611	\$0

Construction cost per unit: \$332,960.72

MAXIMUM COMBINED GR, OVERHEAD & PROFIT = \$9,232,633

ACTUAL COMBINED GR, OVERHEAD & PROFIT =

\$8,722,916

## O. PROJECT BUDGET - OWNER COSTS

		To select exclusion of allowable line items from Total Development Costs used in Cost limit calculations, select X in yellow box to the left.		
MUST USE WHOLE NUMBERS ONLY!  Item	(A) Cost	Amount of Cost up to 100% Includable in Eligible Basis--Use Applicable Column(s):		
		"30% Present Value Credit"		(D)
		(B) Acquisition	(C) Rehab/ New Construction	"70 % Present Value Credit"
<b>2. Owner Costs</b>				
a. Building Permit	477,349	0	477,349	0
b. Architecture/Engineering Design Fee \$5,681 /Unit)	1,278,163	0	1,278,163	0
c. Architecture Supervision Fee \$1,444 /Unit)	325,000	0	325,000	0
d. Tap Fees	2,500,000	0	2,500,000	0
e. Environmental	15,000	0	15,000	0
f. Soil Borings	60,000	0	60,000	0
g. Green Building (Earthcraft, LEED, etc.)	49,912	0	49,912	0
h. Appraisal	24,000	0	24,000	0
i. Market Study	24,000	0	24,000	0
j. Site Engineering / Survey	575,000	0	575,000	0
k. Construction/Development Mgt	0	0	0	0
l. Structural/Mechanical Study	0	0	0	0
m. Construction Loan Origination Fee	0	0	0	0
n. Construction Interest ( 0.0% for 0 months)	4,100,000	0	2,740,000	0
o. Taxes During Construction	1,100,000	0	1,100,000	0
p. Insurance During Construction	1,000,000	0	1,000,000	0
q. Permanent Loan Fee ( 0.0% )	1,048,453			
r. Other Permanent Loan Fees	0			
s. Letter of Credit	0	0	0	0
t. Cost Certification Fee	60,000	0	30,000	0
u. Accounting	0	0	0	0
v. Title and Recording	360,000	0	180,000	0
w. Legal Fees for Closing	645,000	0	168,750	0
x. Mortgage Banker	181,700	0	90,850	0
y. Tax Credit Fee	266,003			
z. Tenant Relocation	0			
aa. Fixtures, Furnitures and Equipment	700,000	0	700,000	0
ab. Organization Costs				
ac. Operating Reserve	2,362,989			
ad. Contingency	0			
ae. Security	0	0	0	0
af. Utilities	2,100,000	0	2,100,000	0
ag. Supportive Service Reserves	0			

O. PROJECT BUDGET - OWNER COSTS

(1) Other* specify:	Marketing	140,000	0	0	0
(2) Other* specify:	Predevelopment Loan Inter	679,269	0	679,269	0
(3) Other* specify:	Legal - Tax Credit Equity	125,000	0	0	0
(4) Other* specify:		0	0	0	0
(5) Other * specify:	Proffers, Other Fees and De	2,150,000	0	2,150,000	0
(6) Other* specify:	Other Design Consultants	492,000	0	492,000	0
(7) Other* specify:	Amazon Loan Costs	2,406,000	0	842,000	0
(8) Other* specify:	Testing and Inspections	320,000	0	320,000	0
(9) Other* specify:	Post Conversion VH Interes	1,670,000	0	0	0
Owner Costs Subtotal (Sum 2A..2(10))		\$27,234,837	\$0	\$17,921,292	\$0
Subtotal 1 + 2 (Owner + Contractor Costs)		\$102,150,998	\$0	\$91,643,903	\$0
3. Developer's Fees		5,000,000	0	3,000,000	
4. Owner's Acquisition Costs					
Land		10			
Existing Improvements		0	0		
Subtotal 4:		\$10	\$0		
5. Total Development Costs					
Subtotal 1+2+3+4:		\$107,151,008	\$0	\$94,643,903	\$0

If this application seeks rehab credits only, in which there is no acquisition and **no change in ownership**, enter the greater of appraised value or tax assessment value here:

(Provide documentation at **Tab E**)

\$10	Land
\$0	Building

**Maximum Developer Fee:** \$5,000,000

Proposed Development's Cost per Sq Foot \$405 **Meets Limits**  
Applicable Cost Limit by Square Foot: \$520

Proposed Development's Cost per Unit \$476,227 **Meets Limits**  
Applicable Cost Limit per Unit: \$550,481

P. ELIGIBLE BASIS CALCULATION

Item	Amount of Cost up to 100% Includable in Eligible Basis--Use Applicable Column(s):			
	(A) Cost	"30 % Present Value Credit"	(D) "70 % Present Value Credit"	
		(B) Acquisition		(C) Rehab/ New Construction
1. Total Development Costs	107,151,008	0	94,643,903	0
2. Reductions in Eligible Basis				
a. Amount of federal grant(s) used to finance qualifying development costs		0	0	0
b. Amount of nonqualified, nonrecourse financing		0	0	0
c. Costs of nonqualifying units of higher quality (or excess portion thereof)		0	0	0
d. Historic Tax Credit (residential portion)		0	0	0
3. Total Eligible Basis (1 - 2 above)		0	94,643,903	0
4. Adjustment(s) to Eligible Basis (For non-acquisition costs in eligible basis)				
a. For QCT or DDA (Eligible Basis x 30%)			0	0
State Designated Basis Boosts:				
b. For Revitalization or Supportive Housing (Eligible Basis x 30%)			0	0
c. For Green Certification (Eligible Basis x 10%)				0
Total Adjusted Eligible basis			94,643,903	0
5. Applicable Fraction				
		100.00000%	100.00000%	100.00000%
6. Total Qualified Basis (Eligible Basis x Applicable Fraction)				
		0	94,643,903	0
7. Applicable Percentage				
		4.00%	4.00%	9.00%
8. Maximum Allowable Credit under IRC §42 (Qualified Basis x Applicable Percentage)				
(Must be same as BIN total and equal to or less than credit amount allowed)		\$0	\$3,785,756	\$0
		\$3,785,756 Combined 30% & 70% P. V. Credit		



Q. SOURCES OF FUNDS

Action: Provide Documentation for all Funding Sources at Tab T

1. Construction Financing: List individually the sources of construction financing, including any such loans financed through grant sources:

Source of Funds	Date of Application	Date of Commitment	Amount of Funds	Name of Contact Person
1. Construction Loan (Bonds)	01/15/24		\$52,000,000	Ryne Johnson, Astoria
2.				
3.				
Total Construction Funding:			\$52,000,000	

2. Permanent Financing: List individually the sources of all permanent financing in order of lien position:

Source of Funds		Date of Application	Date of Commitment	Amount of Funds	Annual Debt Service Cost	Interest Rate of Loan	Amortization Period IN YEARS	Term of Loan (years)
				(Whole Numbers only)				
1.	Virginia Housing Tax Exem	1/15/2024		\$25,340,000	\$1,772,597	5.74%	30	30
2.	Virginia Housing REACH	1/15/2024		\$2,000,000	\$113,889	3.95%	30	30
3.	Virginia Housing REACH	1/15/2024		\$9,000,000	\$512,500	3.95%	30	30
4.	Amazon Housing Equity Fu	6/14/2021	3/1/2023	\$5,278,000	\$184,730	3.50%	9999	30
5.	Amazon Housing Equity Fu	6/14/2021	3/1/2023	\$12,922,000		0.00%	9999	30
6.	FCRHA Housing Blueprint Loan		8/2/2022	\$1,522,773			0	0
7.	FCRHA Housing Blueprint Loan			\$14,000,000			0	0
8.	Accrued Interest Soft Loan			\$2,124,000				
9.	Interest on Unspent Soft Loan			\$451,852				
10.								
Total Permanent Funding:				\$72,638,625	\$2,583,716			

3. Grants: List all grants provided for the development:

Source of Funds	Date of Application	Date of Commitment	Amount of Funds	Name of Contact Person
1.				
2.				
3.				
4.				
5.				
6.				
Total Permanent Grants:			\$0	

Q. SOURCES OF FUNDS

4. Subsidized Funding

	Source of Funds	Date of Commitment	Amount of Funds
1.			
2.			
3.			
4.			
5.			
Total Subsidized Funding			\$0

5. Recap of Federal, State, and Local Funds

Portions of the sources of funds described above for the development are financed directly or indirectly with Federal, State, or Local Government Funds..... FALSE

If above is True, then list the amount of money involved by all appropriate types.

Below-Market Loans

TE: See Below For 50% Test Status

a.	Tax Exempt Bonds	\$52,000,000
b.	RD 515	\$0
c.	Section 221(d)(3)	\$0
d.	Section 312	\$0
e.	Section 236	\$0
f.	Virginia Housing REACH Funds	\$11,000,000
g.	HOME Funds	\$0
h.	Choice Neighborhood	\$0
i.	National Housing Trust Fund	\$0
j.	Virginia Housing Trust Fund	\$0
k.	Other:	\$0
l.	Other:	\$0

Market-Rate Loans

a.	Taxable Bonds	\$0
b.	Section 220	\$0
c.	Section 221(d)(3)	\$0
d.	Section 221(d)(4)	\$0
e.	Section 236	\$0
f.	Section 223(f)	\$0
g.	Other:	\$0

Grants\*

a.	CDBG	\$0
b.	UDAG	\$0

Grants

c.	State	
d.	Local	
e.	Other:	

\*This means grants to the partnership. If you received a loan financed by a locality which received one of the listed grants, please list it in the appropriate loan column as "other" and describe the applicable grant program which funded it.

Q. SOURCES OF FUNDS

6. For Transactions Using Tax-Exempt Bonds Seeking 4% Credits:

For purposes of the 50% Test, and based only on the data entered to this application, the portion of the aggregate basis of buildings and land financed with tax-exempt funds is:

54.94%

7. Some of the development's financing has credit enhancements..... FALSE

If True, list which financing and describe the credit enhancement:

8. Other Subsidies Action: Provide documentation (Tab Q)

- a.

FALSE

Real Estate Tax Abatement on the increase in the value of the development.
- b.

FALSE

New project based subsidy from HUD or Rural Development for the greater of 5 or 10% of the units in the development.
- c.

FALSE

Other

9. A HUD approval for transfer of physical asset is required..... FALSE

**R. EQUITY****1. Equity****a. Portion of Syndication Proceeds Attributable to Historic Tax Credit**

Amount of Federal historic credits	\$0	x Equity \$	\$0.000	=	\$0
Amount of Virginia historic credits	\$0	x Equity \$	\$0.000	=	\$0

**b. Housing Opportunity Tax Credit Request (paired with 4% credit requests only)**

Amount of State HOTC	\$0	x Equity \$	\$0.000	=	\$0
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**c. Equity that Sponsor will Fund:**

i. Cash Investment	\$0	
ii. Contributed Land/Building	\$0	
iii. Deferred Developer Fee	\$1,954,880	(Note: Deferred Developer Fee cannot be negative.)
iv. 45L Credit Equity	\$0	
v. Other:	\$0	

**ACTION:** If Deferred Developer Fee is greater than 50% of overall Developer Fee, provide a cash flow statement showing payoff within 15 years at **TAB A**.

**Equity Total** \$1,954,880

**2. Equity Gap Calculation**

a. Total Development Cost		\$107,151,008
b. Total of Permanent Funding, Grants and Equity	-	<u>\$74,593,505</u>
c. Equity Gap		\$32,557,503
d. Developer Equity	-	<u>\$6,512</u>
e. Equity gap to be funded with low-income tax credit proceeds		\$32,550,991

**3. Syndication Information (If Applicable)**

a. Actual or Anticipated Name of Syndicator:	▶ Hudson Housing Capital		
Contact Person:	Sam Ganeshan	Phone:	202-218-4488
Street Address:	650 Fifth Avenue, Suite 2850		
City:	New York	State:	NY
		Zip:	10111

**b. Syndication Equity**

i. Anticipated Annual Credits	\$3,785,756.00
ii. Equity Dollars Per Credit (e.g., \$0.85 per dollar of credit)	\$0.860
iii. Percent of ownership entity (e.g., 99% or 99.9%)	99.98000%
iv. Syndication costs not included in Total Development Costs (e.g., advisory fees)	\$0
v. Net credit amount anticipated by user of credits	\$3,784,999
vi. Total to be paid by anticipated users of credit (e.g., limited partners)	\$32,550,991

c. Syndication:	Private
d. Investors:	Corporate

**4. Net Syndication Amount**

Which will be used to pay for Total Development Costs	<u>\$32,550,991</u>
---	---------------------

**5. Net Equity Factor**

Must be equal to or greater than 85%	<u>86.0000023787%</u>
--------------------------------------	-----------------------

S. DETERMINATION OF RESERVATION AMOUNT NEEDED

The following calculation of the amount of credits needed is substantially the same as the calculation which will be made by Virginia Housing to determine, as required by the IRC, the amount of credits which may be allocated for the development. However, Virginia Housing at all times retains the right to substitute such information and assumptions as are determined by Virginia Housing to be reasonable for the information and assumptions provided herein as to costs (including development fees, profits, etc.), sources for funding, expected equity, etc. Accordingly, if the development is selected by Virginia Housing for a reservation of credits, the amount of such reservation may differ significantly from the amount you compute below.

1. Total Development Costs			\$107,151,008
2. Less Total of Permanent Funding, Grants and Equity	-		\$74,593,505
3. Equals Equity Gap			\$32,557,503
4. Divided by Net Equity Factor (Percent of 10-year credit expected to be raised as equity investment)			86.0000023787%
5. Equals Ten-Year Credit Amount Needed to Fund Gap			\$37,857,561
Divided by ten years			10
6. Equals Annual Tax Credit Required to Fund the Equity Gap			\$3,785,756
7. Maximum Allowable Credit Amount (from Eligible Basis Calculation)			\$3,785,756
8. Requested Credit Amount		For 30% PV Credit:	\$3,785,756
		For 70% PV Credit:	\$0
Credit per LI Units	\$16,825.5822	<b>Combined 30% &amp; 70% PV Credit Requested</b>	
Credit per LI Bedroom	\$8,970.9858		
			\$3,785,756

9. **Action:** Provide Attorney’s Opinion using Virginia Housing template **(Mandatory Tab H)**

T. CASH FLOW

1. Revenue

Indicate the estimated monthly income for the **Low-Income Units** (based on Unit Details tab):

Total Monthly Rental Income for LIHTC Units	\$417,216
Plus Other Income Source (list): <u>Parking, Misc.</u>	<u>\$27,000</u>
Equals Total Monthly Income:	<u>\$444,216</u>
Twelve Months	x12
Equals Annual Gross Potential Income	\$5,330,592
Less Vacancy Allowance <u>7.0%</u>	<u>\$373,141</u>
<b>Equals Annual Effective Gross Income (EGI) - Low Income Units</b>	<u><u>\$4,957,451</u></u>

2. Indicate the estimated monthly income for the **Market Rate Units** (based on Unit Details tab):

Total Monthly Income for Market Rate Units:	\$0
Plus Other Income Source (list): <u></u>	<u>\$0</u>
Equals Total Monthly Income:	<u>\$0</u>
Twelve Months	x12
Equals Annual Gross Potential Income	\$0
Less Vacancy Allowance <u>7.0%</u>	<u>\$0</u>
<b>Equals Annual Effective Gross Income (EGI) - Market Rate Units</b>	<u><u>\$0</u></u>

**Action:** Provide documentation in support of Operating Budget (**TAB R**)

3. Cash Flow (First Year)

a. Annual EGI Low-Income Units	\$4,957,451
b. Annual EGI Market Units	\$0
c. Total Effective Gross Income	\$4,957,451
d. Total Expenses	\$1,973,791
e. Net Operating Income	\$2,983,660
f. Total Annual Debt Service	\$2,583,716
g. Cash Flow Available for Distribution	\$399,944

## T. CASH FLOW

## 4. Projections for Financial Feasibility - 15 Year Projections of Cash Flow

	Stabilized Year 1	Year 2	Year 3	Year 4	Year 5
Eff. Gross Income	4,957,451	5,056,600	5,157,732	5,260,886	5,366,104
Less Oper. Expenses	1,973,791	2,033,004	2,093,995	2,156,814	2,221,519
Net Income	2,983,660	3,023,595	3,063,737	3,104,072	3,144,585
Less Debt Service	2,583,716	2,583,716	2,583,716	2,583,716	2,583,716
Cash Flow	399,944	439,879	480,021	520,356	560,869
Debt Coverage Ratio	1.15	1.17	1.19	1.20	1.22

	Year 6	Year 7	Year 8	Year 9	Year 10
Eff. Gross Income	5,473,426	5,582,895	5,694,552	5,808,443	5,924,612
Less Oper. Expenses	2,288,164	2,356,809	2,427,514	2,500,339	2,575,349
Net Income	3,185,262	3,226,085	3,267,039	3,308,105	3,349,263
Less Debt Service	2,583,716	2,583,716	2,583,716	2,583,716	2,583,716
Cash Flow	601,546	642,369	683,323	724,389	765,547
Debt Coverage Ratio	1.23	1.25	1.26	1.28	1.30

	Year 11	Year 12	Year 13	Year 14	Year 15
Eff. Gross Income	6,043,105	6,163,967	6,287,246	6,412,991	6,541,251
Less Oper. Expenses	2,652,610	2,732,188	2,814,154	2,898,578	2,985,535
Net Income	3,390,495	3,431,779	3,473,092	3,514,413	3,555,715
Less Debt Service	2,583,716	2,583,716	2,583,716	2,583,716	2,583,716
Cash Flow	806,779	848,063	889,376	930,697	971,999
Debt Coverage Ratio	1.31	1.33	1.34	1.36	1.38

Estimated Annual Percentage Increase in Revenue 2.00% (Must be < 2%)  
Estimated Annual Percentage Increase in Expenses 3.00% (Must be > 3%)

**Must Complete**

Number of BINS:	8
-----------------	---

Please help us with the process:  
DO NOT use the CUT feature  
**DO NOT SKIP LINES BETWEEN BUILDINGS**

225 0 If development has more than 35 buildings, contact Virginia Housing.

\$0

8



**V. STATEMENT OF OWNER**

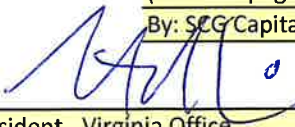
The undersigned hereby acknowledges the following:

1. that, to the best of its knowledge and belief, all factual information provided herein or in connection herewith is true and correct, and all estimates are reasonable.
2. that it will at all times indemnify and hold harmless Virginia Housing and its assigns against all losses, costs, damages, Virginia Housing's expenses, and liabilities of any nature directly or indirectly resulting from, arising out of, or relating to Virginia Housing's acceptance, consideration, approval, or disapproval of this reservation request and the issuance or nonissuance of an allocation of credits, grants and/or loan funds in connection herewith.
3. that points will be assigned only for representations made herein for which satisfactory documentation is submitted herewith and that no revised representations may be made in connection with this application once the deadline for applications has passed.
4. that this application form, provided by Virginia Housing to applicants for tax credits, including all sections herein relative to basis, credit calculations, and determination of the amount of the credit necessary to make the development financially feasible, is provided only for the convenience of Virginia Housing in reviewing reservation requests; that completion hereof in no way guarantees eligibility for the credits or ensures that the amount of credits applied for has been computed in accordance with IRC requirements; and that any notations herein describing IRC requirements are offered only as general guides and not as legal authority.
5. that the undersigned is responsible for ensuring that the proposed development will be comprised of qualified low-income buildings and that it will in all respects satisfy all applicable requirements of federal tax law and any other requirements imposed upon it by Virginia Housing prior to allocation, should one be issued.
6. that the undersigned commits to providing first preference to members of targeted populations having state rental assistance and will not impose any eligibility requirements or lease terms for such individuals that are more restrictive than its standard requirements and terms, the terms of the MOU establishing the target population, or the eligibility requirements for the state rental assistance.
7. that, for the purposes of reviewing this application, Virginia Housing is entitled to rely upon representations of the undersigned as to the inclusion of costs in eligible basis and as to all of the figures and calculations relative to the determination of qualified basis for the development as a whole and/or each building therein individually as well as the amounts and types of credit applicable thereof, but that the issuance of a reservation based on such representation in no way warrants their correctness or compliance with IRC requirements.
8. that Virginia Housing may request or require changes in the information submitted herewith, may substitute its own figures which it deems reasonable for any or all figures provided herein by the undersigned and may reserve credits, if any, in an amount significantly different from the amount requested.
9. that reservations of credits are not transferable without prior written approval by Virginia Housing at its sole discretion.

V. STATEMENT OF OWNER

- 10. that the requirements for applying for the credits and the terms of any reservation or allocation thereof are subject to change at any time by federal or state law, federal, state or Virginia Housing regulations, or other binding authority.
- 11. that reservations may be made subject to certain conditions to be satisfied prior to allocation and shall in all cases be contingent upon the receipt of a nonrefundable application fee of \$1000 and a nonrefundable reservation fee equal to 7% of the annual credit amount reserved.
- 12. that a true, exact, and complete copy of this application, including all the supporting documentation enclosed herewith, has been provided to the tax attorney who has provided the required attorney's opinion accompanying this submission.
- 13. that the undersigned has provided a complete list of all residential real estate developments in which the general partner(s) has (have) or had a controlling ownership interest and, in the case of those projects allocated credits under Section 42 of the IRC, complete information on the status of compliance with Section 42 and an explanation of any noncompliance. The undersigned hereby authorizes the Housing Credit Agencies of states in which these projects are located to share compliance information with the Authority.
- 14. that any principal of undersigned has not participated in a planned foreclosure or Qualified Contract request in Virginia after January 1, 2019.
- 15. that undersigned agrees to provide disclosure to all tenants of the availability of Renter Education provided by Virginia Housing.
- 16. that undersigned waives the right to pursue a Qualified Contract on this development.
- 17. that the information in this application may be disseminated to others for purposes of verification or other purposes consistent with the Virginia Freedom of Information Act. However, all information will be maintained, used or disseminated in accordance with the Government Data Collection and Dissemination Practices Act. The undersigned may refuse to supply the information requested, however, such refusal will result in Virginia Housing's inability to process the application. The original or copy of this application may be retained by Virginia Housing, even if tax credits are not allocated to the undersigned.

In Witness Whereof, the undersigned, being authorized, has caused this document to be executed in its name on the date of this application set forth in DEV Info tab hereof.

Legal Name of Owner: Somos Phase B, LLC  
(see next page for full signagure block)  
By: SCG Capital Corp.  
By:   
Its: President - Virginia Office  
(Title)

**SOMOS PHASE B, LLC,**  
a Virginia limited liability company

By: Somos Phase B MM, LLC,  
a Virginia limited liability company,  
its managing member

By: SCG Development Partners, LLC,  
a Delaware limited liability company  
its managing member

By: SCG Development Manager, LLC,  
a Delaware limited liability company  
its managing member

By: SCG Capital Corp.,  
a Delaware nonstock corporation  
its sole member

By: 

Name: Stephen P. Wilson

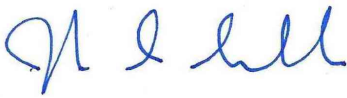
Title: President – Virginia Office

V. STATEMENT OF ARCHITECT

The architect signing this document is certifying that the development plans and specifications incorporate all Virginia Housing Minimum Design and Construction Requirements (MDCR), selected LIHTC enhancements and amenities, applicable building codes and accessibility requirements.

In Witness Whereof, the undersigned, being authorized, has caused this document to be executed in its name on the date of this application set forth in DEV Info tab hereof.

Legal Name of Architect:	Joseph Steven Saville
Virginia License#:	0401012654
Architecture Firm or Company:	Davis, Carter, Scott, Ltd.

By:	
Its:	Project Director
	(Title)

Initials by Architect are also required on the following Tabs: Enhancement, Special Housing Needs and Unit Details.

W.

LIHTC SELF SCORE SHEET

Self Scoring Process

This Self Scoring Process is intended to provide you with an estimate of your application's score based on the information included within the reservation application. Other items, denoted below in the yellow shaded cells, are typically evaluated by Virginia Housing's staff during the application review and feasibility process. For purposes of self scoring, we have made certain assumptions about your application. Edit the appropriate responses (Y or N) in the yellow shaded cells, if applicable. Items 5f and 5g require a numeric value to be entered.

Please remember that this score is only an estimate. Virginia Housing reserves the right to change application data and/or score sheet responses where appropriate, which may change the final score.

MANDATORY ITEMS:		Included	Score
a. Signed, completed application with attached tabs in PDF format	Y	Y or N	0
b. Active Excel copy of application	Y	Y or N	0
c. Partnership agreement	Y	Y or N	0
d. SCC Certification	Y	Y or N	0
e. Previous participation form	Y	Y or N	0
f. Site control document	Y	Y or N	0
g. RESNET Certification	Y	Y or N	0
h. Attorney's opinion	Y	Y or N	0
i. Nonprofit questionnaire (if applicable)	Y	Y, N, N/A	0
j. Appraisal	Y	Y or N	0
k. Zoning document	Y	Y or N	0
l. Universal Design Plans	Y	Y or N	0
m. List of LIHTC Developments (Schedule A)	Y	Y or N	0
Total:			0.00
1. READINESS:			
a. Virginia Housing notification letter to CEO (via Locality Notification Information App)	Y	0 or -50	0.00
b. Local CEO Opposition Letter	N	0 or -25	0.00
c. Plan of development	N	0 to 10	0.00
d. Location in a revitalization area based on Qualified Census Tract	N	0 or 10	0.00
e. Location in a revitalization area with resolution	Y	0 or 15	15.00
f. Location in a Opportunity Zone	N	0 or 15	0.00
Total:			15.00
2. HOUSING NEEDS CHARACTERISTICS:			
a. Sec 8 or PHA waiting list preference	Y	0 or up to 5	5.00
b. Existing RD, HUD Section 8 or 236 program	N	0 or 20	0.00
c. Subsidized funding commitments	0.00%	Up to 40	0.00
d. Tax abatement on increase of property's value	N	0 or 5	0.00
e. New project based rental subsidy (HUD or RD)	N	0 or 10	0.00
f. Census tract with <12% poverty rate	3%	0, 20, 25 or 30	30.00
g. Development provided priority letter from Rural Development	N	0 or 15	0.00
h. Dev. located in area with increasing rent burdened population	Y	Up to 20	20.00
Total:			55.00

## 3. DEVELOPMENT CHARACTERISTICS:

a. Enhancements (See calculations below)			41.00
b. Project subsidies/HUD 504 accessibility for 5 or 10% of units	N	0 or 50	0.00
or c. HUD 504 accessibility for 10% of units	N	0 or 20	0.00
d. Provides approved resident services or eligible childcare services	N	0 or 15	0.00
e. Provides telephonic or virtual health services	N	0 or 15	0.00
f. Proximity to public transportation	Y10	0, 10 or 20	10.00
g. Development will be Green Certified	Y	0 or 10	10.00
h. Units constructed to meet Virginia Housing's Universal Design standards	0%	Up to 15	0.00
i. Developments with less than 100 low income units	N	up to 20	0.00
j. Historic Structure eligible for Historic Rehab Credits	N	0 or 5	0.00
Total:			61.00

## 4. TENANT POPULATION CHARACTERISTICS:

Locality AMI	State AMI
\$152,100	\$73,800

a. Less than or equal to 20% of units having 1 or less bedrooms	N	0 or 15	0.00
b. <plus> Percent of Low Income units with 3 or more bedrooms	11.56%	Up to 15	0.00
c. Units with rent and income at or below 30% of AMI and are not subsidized (up to 10% of LI units)	0.00%	Up to 10	0.00
d. Units with rents at or below 40% of AMI (up to 10% of LI units)	0.00%	Up to 10	0.00
e. Units in Higher Income Jurisdictions with rent and income at or below 50% of AMI	23.56%	Up to 50	23.56
f. Units in Higher Income Jurisdictions with rents <= 50% rented to tenants with <= 60% of AMI	23.56%	Up to 25	0.00
or g. Units in LI Jurisdictions with rents <= 50% rented to tenants with <= 60% of AMI	23.56%	Up to 50	0.00
Total:			23.56

## 5. SPONSOR CHARACTERISTICS:

a. Experienced Sponsor - 1 development in Virginia	N	0 or 5	0.00
b. Experienced Sponsor - 3 developments in any state	Y	0 or 15	15.00
c. Developer experience - uncorrected life threatening hazard	N	0 or -50	0.00
d. Developer experience - noncompliance	N	0 or -15	0.00
e. Developer experience - did not build as represented (per occurrence)	0	0 or -2x	0.00
f. Developer experience - failure to provide minimum building requirements (per occurrence)	0	0 or -50 per item	0.00
g. Developer experience - termination of credits by Virginia Housing	N	0 or -10	0.00
h. Developer experience - exceeds cost limits at certification	N	0 or -50	0.00
i. Developer experience - more than 2 requests for Final Inspection	0	0 or -5 per item	0.00
j. Socially Disadvantaged Principal owner 25% or greater	N	0 or 5	0.00
k. Management company rated unsatisfactory	N	0 or -25	0.00
l. Experienced Sponsor partnering with Local Housing Authority pool applicant	N	0 or 5	0.00
Total:			15.00

## 6. EFFICIENT USE OF RESOURCES:

a. Credit per unit	Up to 200	89.00
b. Cost per unit	Up to 100	44.18
Total:		133.18

## 7. BONUS POINTS:

a. Extended Use Restriction	0 Years	40 or 50	0.00
or b. Nonprofit or LHA purchase option	N	0 or 60	0.00
or c. Nonprofit or LHA Home Ownership option	N	0 or 5	0.00
d. Combined 9% and 4% Tax Exempt Bond Site Plan	N	Up to 30	0.00
e. RAD or PHA Conversion participation and competing in Local Housing Authority pool	N	0 or 10	0.00
f. Team member with Diversity, Equity and Inclusion Designation	N	0 or 5	0.00
g. Commitment to electronic payment of fees	Y	0 or 5	5.00
h. Zero Ready or Passive House certification from prior allocation	N	0 or 20	0.00
Total:			5.00

400 Point Threshold - all 9% Tax Credits  
 300 Point Threshold - Tax Exempt Bonds

**TOTAL SCORE: 307.74**

**Enhancements:**

All units have:

	Max Pts	Score
a. Community Room	5	0.00
b. Exterior walls constructed with brick and other low maintenance materials	40	36.00
c. Sub metered water expense	5	5.00
d. Watersense labeled faucets, toilets and showerheads	3	0.00
e. Rehab only: Infrastructure for high speed internet/broadband	1	0.00
f. N/A for 2022	0	0.00
g. Each unit provided free individual high speed internet access	10	0.00
h. Each unit provided free individual WiFi	12	0.00
i. Bath Fan - Delayed timer or continuous exhaust	3	0.00
j. Baths equipped with humidistat	3	0.00
k. Cooking Surfaces equipped with fire prevention features	4	0.00
l. Cooking surfaces equipped with fire suppression features	2	0.00
m. Rehab only: dedicated space to accept permanent dehumidification system	2	0.00
n. Provides Permanently installed dehumidification system	5	0.00
o. All interior doors within units are solid core	3	0.00
p. USB in kitchen, living room and all bedrooms	1	0.00
q. LED Kitchen Light Fixtures	2	0.00
r. % of renewable energy electric systems	10	0.00
s. New Construction: Balcony or patio	4	0.00
		<u>41.00</u>

All elderly units have:

t. Front-control ranges	1	0.00
u. Independent/suppl. heat source	1	0.00
v. Two eye viewers	1	0.00
w. Shelf or Ledge at entrance within interior hallway	2	0.00
		<u>0.00</u>

**Total amenities: 41.00**

X.

Development Summary

Summary Information

2024 Low-Income Housing Tax Credit Application For Reservation

Deal Name:

Somos Phase B

Cycle Type:4% Tax Exempt Bonds Credits

Requested Credit Amount:\$3,785,756

Allocation Type:New Construction

Jurisdiction:Fairfax County

Total Units225

Population Target:General

Total LI Units225

Total Score307.74

Project Gross Sq Ft:264,475.18

Owner Contact:StephenWilson

Green Certified?TRUE

Source of Funds	Amount	Per Unit	Per Sq Ft	Annual Debt Service
Permanent Financing	\$72,638,625	\$322,838	\$275	\$2,583,716
Grants	\$0	\$0		
Subsidized Funding	\$0	\$0		

Uses of Funds - Actual Costs				
Type of Uses	Amount	Per Unit	Sq Ft	% of TDC
Improvements	\$65,947,377	\$293,099	\$249	61.55%
General Req/Overhead/Profit	\$8,722,916	\$38,769	\$33	8.14%
Other Contract Costs	\$245,868	\$1,093	\$1	0.23%
Owner Costs	\$27,234,837	\$121,044	\$103	25.42%
Acquisition	\$10	\$0	\$0	0.00%
Developer Fee	\$5,000,000	\$22,222	\$19	4.67%
Total Uses	\$107,151,008	\$476,227		

Income		
Gross Potential Income - LI Units		
	\$5,330,592	
Gross Potential Income - Mkt Units		
	\$0	
Subtotal		
	\$5,330,592	
Less Vacancy %	7.00%	\$373,141
Effective Gross Income		
	\$4,957,451	

Rental Assistance?

FALSE

Expenses		
Category	Total	Per Unit
Administrative	\$624,025	\$2,773
Utilities	\$118,742	\$528
Operating & Maintenance	\$299,254	\$1,330
Taxes & Insurance	\$864,269	\$3,841
Total Operating Expenses	\$1,906,291	\$8,472
Replacement Reserves	\$67,500	\$300
Total Expenses	\$1,973,791	\$8,772

Cash Flow	
EGI	\$4,957,451
Total Expenses	\$1,973,791
Net Income	\$2,983,660
Debt Service	\$2,583,716
Debt Coverage Ratio (YR1):	1.15

Total Development Costs	
Total Improvements	\$102,150,998
Land Acquisition	\$10
Developer Fee	\$5,000,000
Total Development Costs	\$107,151,008

Proposed Cost Limit/Sq Ft:

\$405

Applicable Cost Limit/Sq Ft:

\$520

Proposed Cost Limit/Unit:

\$476,227

Applicable Cost Limit/Unit:

\$550,481

Unit Breakdown	
Supp Hsg	0
# of Eff	7
# of 1BR	40
# of 2BR	152
# of 3BR	26
# of 4+ BR	0
Total Units	225

	Income Levels	Rent Levels
	# of Units	# of Units
<=30% AMI	0	0
40% AMI	0	0
50% AMI	53	53
60% AMI	120	120
>60% AMI	52	52
Market	0	0

Income Averaging?

TRUE

Extended Use Restriction?

30



## Y. Efficient Use of Resources

### Credit Points for 9% Credits:

If the Combined Max Allowable Credits is \$500,000 and the annual credit requested is \$200,000, you are providing a 60% savings for the program. This deal would receive all 200 credit points.

For another example, the annual credit requested is \$300,000 or a 40% savings for the program. Using a sliding scale, the credit points would be calculated by the difference between your savings and the desired 60% savings. Your savings divided by the goal of 60% times the max points of 200. In this example,  $(40\%/60\%) \times 200$  or 133.33 points.

Tax Exempt Deals are granted a starting point value greater than zero to allow for the nature of these deals.

Combined Max	\$3,785,756
Credit Requested	\$3,785,756
% of Savings	0.00%
Sliding Scale Points	89

### Cost Points:

If the Applicable Cost by Square foot is \$238 and the deal's Proposed Cost by Square Foot was \$119, you are saving 50% of the applicable cost. This deal would receive all 100 cost points.

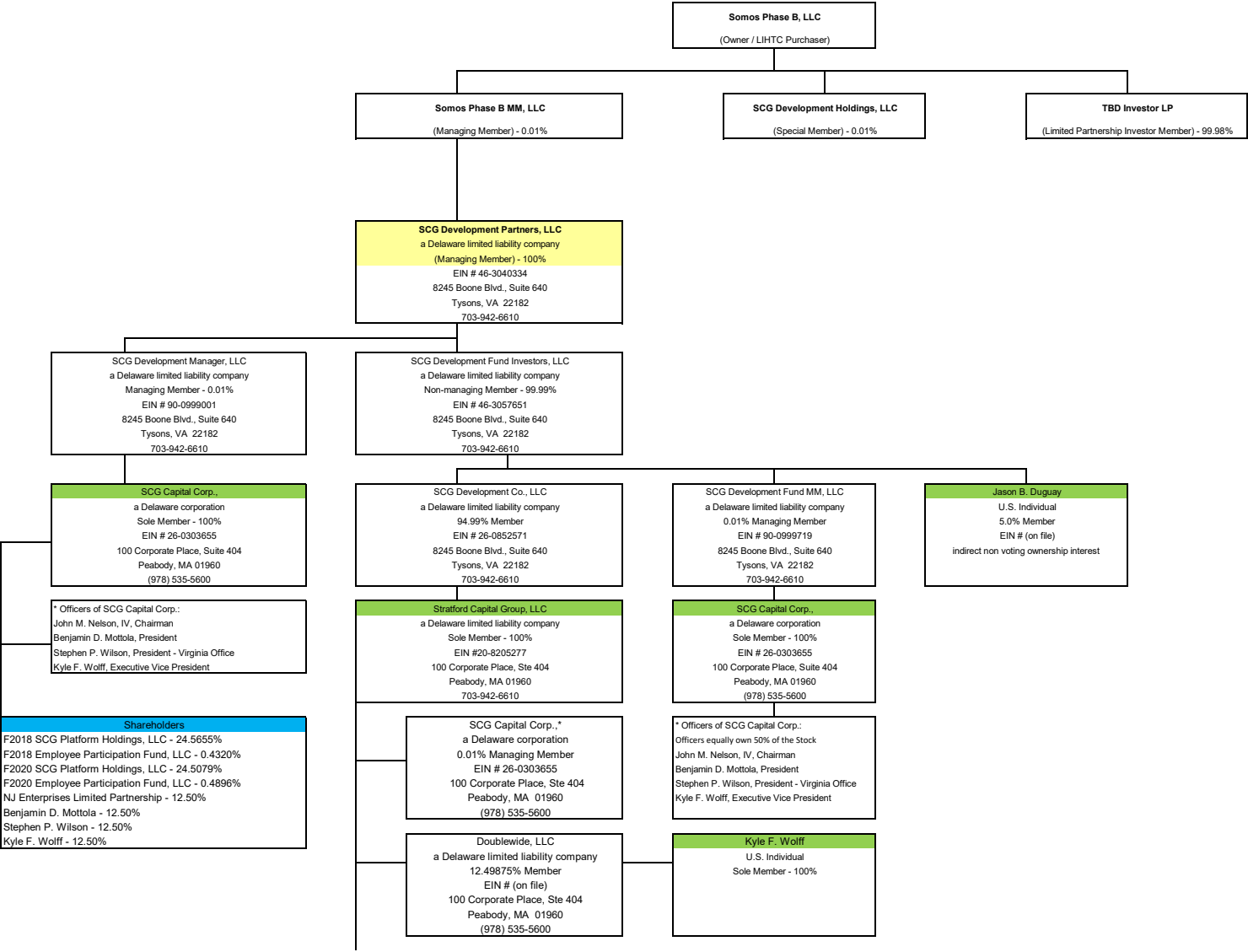
For another example, the Applicable Cost by SqFt is \$238 and the deal's Proposed Cost is \$153.04 or a savings of 35.70%. Using a sliding scale, your points would be calculated by the difference between your savings and the desired 50% savings. Your savings divided by the goal of 50% times the max points 100. In this example,  $(35.7\%/50\%) \times 100$  or 71.40 points.

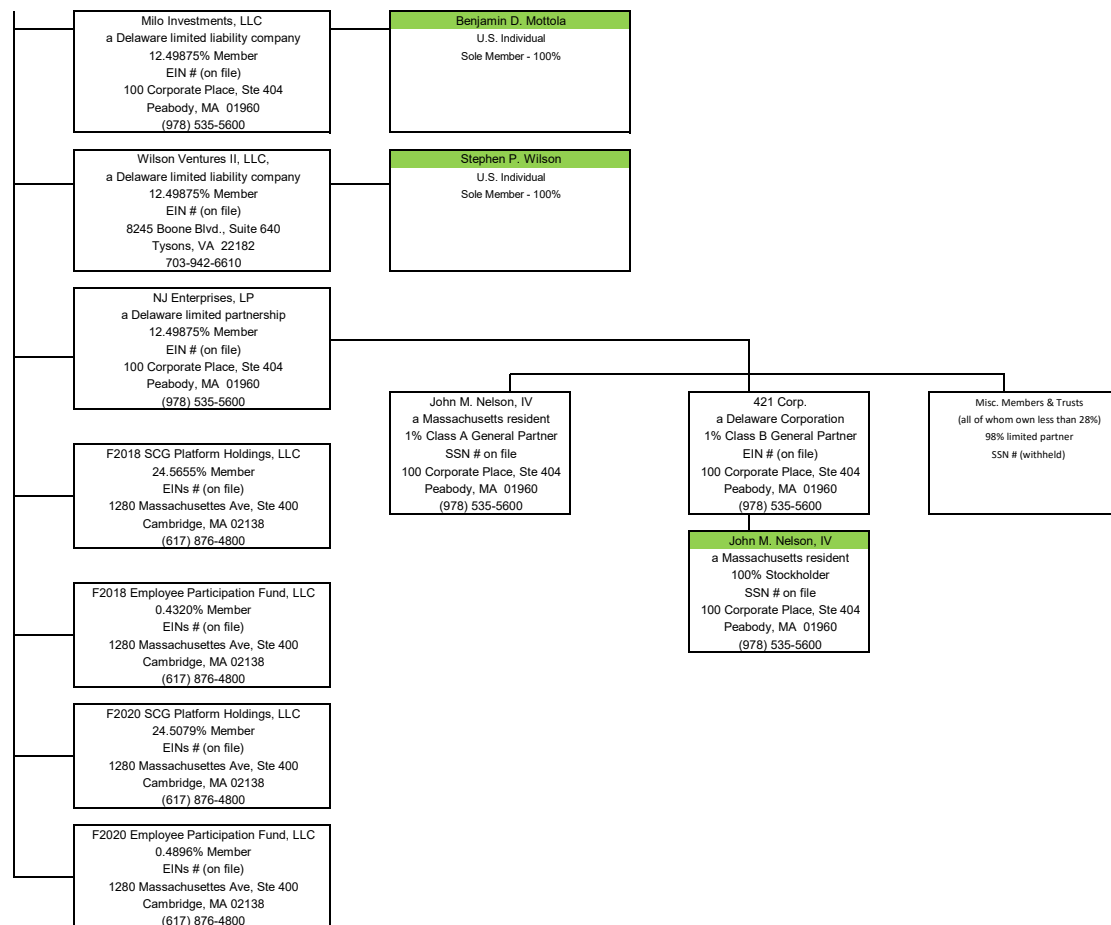
Total Costs Less Acquisition	\$107,150,998		
Total Square Feet	264,475.18		
Proposed Cost per SqFt	\$405.15		
Applicable Cost Limit per Sq Ft	\$520.00		
% of Savings	22.09%		
Total Units	225		
Proposed Cost per Unit	\$476,227		
Applicable Cost Limit per Unit	\$550,481		
% of Savings	13.49%		
Max % of Savings	22.09%	Sliding Scale Points	44.18

# Tab A:

Organizational Documents, developer fee agreement and Org Chart for this deal  
(MANDATORY)

Somos Phase B, LLC Organizational Chart





**OPERATING AGREEMENT  
OF  
SOMOS PHASE B, LLC**

This Operating Agreement (the “**Agreement**”) of Somos Phase B, LLC (the “**Company**”), a limited liability company organized pursuant to Chapter 12 of Title 13.1 of the Code of Virginia (the “**Act**”), is entered into by: Somos Phase B MM, LLC, to form a limited liability company, in accordance with the Act, as the sole and managing member of the Company (the “**Managing Member**”).

1.     **Purpose and Powers.** The purpose of the Company is to serve as the owner of the development and property commonly known as Somos Phase B, located in McLean, Virginia (the “**Project**”), and to undertake any other activity which a limited liability company may lawfully undertake under the Act.

2.     **Separateness.** The Company will conduct its business and operations in its own name and will maintain books and records and bank accounts separate from those of any other person or entity.

3.     **Management.** The Company will be member-managed. Somos Phase B MM, LLC will carry the title of “Managing Member” and will exercise full and exclusive control over the affairs of the Company. The Managing Member may appoint officers and agents for the Company and give them such titles and powers as the Managing Member may choose. Any action taken by the Managing Member in the name of the Company, and any action taken by an officer or agent of the Company in the name of the Company and with the proper authorization of the Managing Member, will be an action of the Company.

4.     **Members and Interests.** The sole member of the Company (the “**Member**”), its title, interests in the Company (the “**Interests**”), and capital contributions to the Company (the “**Capital Contributions**”) are as follows:

<u>Name</u>	<u>Title</u>	<u>Interest</u>	<u>Capital Contribution</u>
Somos Phase B MM, LLC	Managing Member	100%	\$100.00

The Member is not obligated to make additional Capital Contributions to the Company.

5.     **Allocations and Distributions.** Except for any special allocations required to comply with applicable tax laws, all profits, gains, losses, and credits for tax purposes, net cash flow from normal operations, net proceeds from capital transactions, and all other distributions will be allocated to the Member, pro rata in accordance with its Interests.

6.     **Dissolution.** The Company will dissolve upon the first to occur of (i) the sale or other disposition of all or substantially all of the Company's property and the Company's receipt of all or substantially all of the proceeds thereof, or (ii) the determination of the Member to dissolve.

7. **Fiscal Year.** The fiscal year of the Company will be the calendar year.

8. **No Liability of Member and Others.** The Member and its agents and any officers and agents of the Company will not be liable for the Company's liabilities, debts or obligations, all of which will be the sole obligation of the Company. The failure by the Company to observe any formalities or requirements relating to the exercise of its powers or the management of its business or affairs under this Agreement will not be grounds for imposing personal liability on the Member or any officer.

9. **Indemnification.** The Company will indemnify and defend the Member and its agents and any officers and agents of the Company, from and against all costs, losses, liabilities and damages incurred by or asserted against any such person in connection with the Company's business to the fullest extent provided or allowed by law.

10. **Amendment.** This Agreement may be amended only by written instrument executed by the Member and indicating an express intention to amend this instrument.

11. **Governing Law.** This Agreement will be interpreted, construed and enforced in accordance with the laws of the Commonwealth of Virginia.

The undersigned has executed this Agreement effective as of October 25, 2023.

*[signature page follows]*

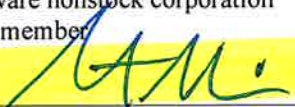
[signature page to Operating Agreement of Somos Phase B, LLC]

**SOMOS PHASE B MM, LLC,**  
a Virginia limited liability company

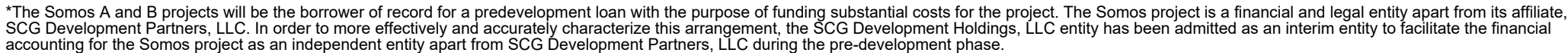
By: SCG Development Partners, LLC,  
a Delaware limited liability company  
its managing member

By: SCG Development Manager, LLC,  
a Delaware limited liability company  
its managing member

By: SCG Capital Corp.,  
a Delaware nonstock corporation  
its sole member

By:   
Name: Stephen P. Wilson  
Title: President – Virginia Office

**Somosa Phase B, LLC**  
(Owner / LHTC Purchaser)





**FIRST AMENDMENT  
TO  
OPERATING AGREEMENT  
OF  
SOMOS PHASE B, LLC**

**THIS FIRST AMENDMENT TO OPERATING AGREEMENT OF SOMOS PHASE B, LLC** (the “**First Amendment**”) is made and delivered as of the 30<sup>th</sup> day of November, 2023 (the “**Effective Date**”) by **SOMOS PHASE B MM, LLC**, a Virginia limited liability company (hereinafter called “**Managing Member**”).

**RECITALS**

A. WHEREAS, that certain Operating Agreement of Somos Phase B, LLC (the “**Original Agreement**”) dated as of October 25, 2023, was executed by Managing Member.

B. WHEREAS, the parties and signatories now wish to amend the Original Agreement in order to admit an Investor Member.

NOW, THEREFORE, the undersigned Managing Member hereby declares the following to be the First Amendment to Operating Agreement of the Company as of the Effective Date.

I. The fourth paragraph of the Original Agreement is deleted in its entirety, and the following paragraph is inserted in lieu thereof:

“**Members and Interests.** The Members of the Company, its title, interests in the Company (the “Interests”), and capital contributions to the Company (the “Capital Contributions”) are as follows:

<u>Name</u>	<u>Title</u>	<u>Interest</u>	<u>Capital Contributions</u>
Somos Phase B MM, LLC	Managing Member	50%	\$100.00
SCG Development Holdings, LLC	Investor Member	50%	\$100.00

The Members are not obligated to make additional Capital Contributions to the Company.”

II. Section 5 of the Original Agreement is deleted in its entirety, and the following section is inserted in lieu thereof:

**Allocations and Distributions.** Except for any special allocations required to comply with applicable tax laws, all profits, gains, losses, and credits for tax purposes,

net cash flow from normal operations, net proceeds from capital transactions, and all other distributions will be allocated to the Members pro rata in accordance with their Interests.

III. All references to terms “Member” in the Original Agreement are hereby deleted, and the term “Members” is inserted in each instance in lieu thereof. Accordingly, the Original Agreement is hereby amended to reflect that there are multiple members of the Company.

IV. This First Amendment shall be governed by the laws of the Commonwealth of Virginia, without reference to its conflicts of laws principles.

V. The terms, covenants and conditions of this First Amendment shall be binding upon and inure to the benefit of the heirs, successors and assigns of the Borrower and the Lender.

VI. If any provision of this First Amendment should be held unenforceable or void, that provision shall be deemed severable from the remaining provisions and shall in no way affect the validity of this First Amendment of the Original Operating Agreement.

VII. Unless otherwise and specifically amended or modified by the terms and provisions of this First Amendment, all of the terms and provisions of the Original Agreement remain unchanged, in full force and effect, and are hereby ratified by the Managing Member. From and after the Effective Date, the term “Agreement” or “Operating Agreement of SOMOS PHASE B, LLC”, shall mean and refer to the Original Agreement as amended by this First Amendment.

The undersigned has executed this First Amendment effective as of the Effective Date.

[ SIGNATURE PAGES FOLLOW]

[ Signature page to First Amendment to Operating Agreement of SOMOS PHASE B, LLC]


**MANAGING MEMBER**

**SOMOS PHASE B MM, LLC**

By: SCG Development Partners, LLC,  
A Delaware limited liability company

By: SCG Development Manager, LLC,  
its managing member

By: SCG Capital Corp.,  
its sole member

By:   
Name: Stephen P. Wilson  
Title: President – Virginia Office


**INVESTOR MEMBER**

**SCG DEVELOPMENT HOLDINGS, LLC**

By: SCG Development Partners, LLC,  
A Delaware limited liability company  
its managing member

By: SCG Development Manager, LLC,  
its managing member

By: SCG Capital Corp.,  
its sole member

By:   
Name: Stephen P. Wilson  
Title: President – Virginia Office

# **Tab B:**

Virginia State Corporation Commission Certification  
(MANDATORY)

# Commonwealth of Virginia



## STATE CORPORATION COMMISSION

Richmond, October 25, 2023

This is to certify that the certificate of organization of

### **Somos Phase B, LLC**

was this day issued and admitted to record in this office and that the said limited liability company is authorized to transact its business subject to all Virginia laws applicable to the company and its business.

Effective date: October 25, 2023



STATE CORPORATION COMMISSION

Attest:

A handwritten signature in cursive script, reading "Bernard J. St. John".

Clerk of the Commission

**COMMONWEALTH OF VIRGINIA  
STATE CORPORATION COMMISSION**

AT RICHMOND, OCTOBER 25, 2023

The State Corporation Commission has found the accompanying articles of organization submitted on behalf of

**Somos Phase B, LLC**

to comply with the requirements of law, and confirms payment of all required fees. Therefore, it is ORDERED that this

**CERTIFICATE OF ORGANIZATION**

be issued and admitted to record with the articles of organization in the Office of the Clerk of the Commission, effective October 25, 2023.

The limited liability company is granted the authority conferred on it by law in accordance with the articles of organization, subject to the conditions and restrictions imposed by law.

STATE CORPORATION COMMISSION

By

A handwritten signature in black ink, appearing to read "Jehmal T. Hudson", followed by a long horizontal flourish.

Jehmal T. Hudson  
Commissioner

# **Tab C:**

Principal's Previous Participation Certification  
(MANDATORY)

## Appendices continued

### Previous Participation Certification

Development Name Somos Phase B

Name of Applicant (entity) Somos Phase B, LLC

#### **I hereby certify that:**

1. All the statements made by me are true, complete and correct to the best of my knowledge and belief and are made in good faith, including the data contained in Schedule A and any statements attached to this certification.
2. During any time that any of the participants were principals in any multifamily rental property, no property has been foreclosed upon, in default or assigned to the mortgage insurer (governmental or private); nor has mortgage relief by the mortgagee been given;
3. During any time that any of the participants were principals in any multifamily rental property, there has not been any breach by the owner of any agreements relating to the construction or rehabilitation, use, operation, management or disposition of the property, including removal from a partnership;
4. That at no time have any principals listed in this certification been required to turn in a property to the investor or have been removed from a multifamily rental property ownership structure;
5. That to the best of my knowledge, there are no unresolved findings raised as a result of state or federal audits, management reviews or other governmental investigations concerning any multifamily rental property in which any of the participants were principals;
6. During any time that any of the participants were principals in any multifamily rental property, there has not been a suspension or termination of payments under any state or federal assistance contract for the property;
7. None of the participants has been convicted of a felony and is not presently, to my knowledge, the subject of a complaint or indictment charging a felony. A felony is defined as any offense punishable by imprisonment for a term exceeding one year, but does not include any offense classified as a misdemeanor under the laws of a state and punishable by imprisonment of two years or less;
8. None of the participants has been suspended, debarred or otherwise restricted by any federal or state governmental entity from doing business with such governmental entity; and
9. None of the participants has defaulted on an obligation covered by a surety or performance bond and has not been the subject of a claim under an employee fidelity bond.
10. None of the participants is a Virginia Housing employee or a member of the immediate household of any of its employees.
11. None of the participants is participating in the ownership of a multifamily rental housing property as of this date on which construction has stopped for a period in excess of 20 days or, in the case of a multifamily rental housing property assisted by any federal or state



## Appendices continued

governmental entity, which has been substantially completed for more than 90 days but for which requisite documents for closing, such as the final cost certification, have not been filed with such governmental entity.

12. None of the participants has been found by any federal or state governmental entity or court to be in noncompliance with any applicable civil rights, equal employment opportunity or fair housing laws or regulations.
13. None of the participants was a principal in any multifamily rental property which has been found by any federal or state governmental entity or court to have failed to comply with Section 42 of the Internal Revenue Code of 1986, as amended, during the period of time in which the participant was a principal in such property. This does not refer to corrected 8823's.
14. None of the participants is currently named as a defendant in a civil lawsuit arising out of their ownership or other participation in a multi-family housing development where the amount of damages sought by plaintiffs (i.e., the ad damnum clause) exceeds One Million Dollars (\$1,000,000).
15. None of the participants has pursued a Qualified Contract or planned foreclosure in Virginia after January 1, 2019.

Statements above (if any) to which I cannot certify have been deleted by striking through the words. In the case of any such deletion, I have attached a true and accurate statement to explain the relevant facts and circumstances.

Failure to disclose information about properties which have been found to be out of compliance or any material misrepresentations are grounds for rejection of an application and prohibition against future applications.



Signature

Stephen Wilson

Printed Name

12/15/2023

Date (no more than 30 days prior to submission of the Application)

# **Tab D:**

List of LIHTC Developments (Schedule A)  
(MANDATORY)

# List of LIHTC Developments (Schedule A)



Development Name: Somos Phase B

Name of Applicant: Somos Phase B, LLC

## INSTRUCTIONS:

- 1 A Schedule A is required for **every** individual that makes up the GP or Managing Member - does not apply to principals of publicly traded corporations.
- 2 For each property for which an uncorrected 8823 has been issued, provide a detailed explanation of the nature of the non-compliance, as well as a status statement.
- 3 List only tax credit development experience since 2007 (i.e. for the past 15 years)
- 4 Use separate pages as needed, for each principal.

Principal's Name: SCG Development Partners, LLC Controlling GP (CGP) or 'Named' Managing Member of Proposed property? Y or N

	Development Name/Location	Name of Ownership Entity and Phone Number	CGP or 'Named' Managing Member at the time of dev.? (Y/N)*	Total Dev. Units	Total Low Income Units	Placed in Service Date	8609(s) Issue Date	Uncorrected 8823's? (Y/N) Explain "Y"
1	Coyle School Residences, LP Taunton, MA	Coyle School Residences 703.942.6610	Y	50	45	TBD	TBD	N
2	Ovata at Reedy Creek, LP Charlotte, NC	Ovata at Reedy Creek, LP 703.942.6610	Y	78	78	TBD	TBD	N
3	500 Northside Station Spartanburg, SC	Partans, LLC 703.942.6610	Y	90	81	7/30/2021	9/1/2022	N
4	Renaissance Place Greenville, SC	Renaissance Place, LP 703.942.6610	Y	57	57	10/11/2019	3/4/2022	N
5	Silver Creek Kensington, MD	Knowles Manor Senior Housing LLC 703.942.6610	Y	94	94	12/28/2021	7/31/2023	N
6	Parkside at Hickory Grove Charlotte, NC	Parkside at Hickory Grove, LP 703.942.6610	Y	80	80	10/1/2021	12/15/2022	N
7	Ovation at Arrowbrook I Herndon, VA	Arrowbrook Apartments I, LLC 703.942.6610	Y	126	126	3/30/2023	TBD	N
8	Ovation at Arrowbrook II Herndon, VA	Arrowbrook Apts II, LLC 703.942.6610	Y	148	148	4/14/2023	TBD	N
9	Oxford School Residences Fairhaven, MA	Oxford School Residences LP 978.535.5600	Y	52	45	6/13/2022	4/3/2023	N
10	One University Family Fairfax, VA	One University Family, LLC 703.942.6610	Y	120	120	TBD	TBD	N
11	One University Senior Fairfax, VA	One University Senior, LLC 703.942.6610	Y	120	120	TBD	TBD	N
12	Parkside at Butler Mauldin, SC	Parkside at Butler, LP 703.942.6610	Y	72	72	2/15/2023	TBD	N
13	Frederick Road Senior Housing Gaithersburg, MD	Frederick Road Senior 4% Owner LLC 703.942.6610	Y	111	111	TBD	TBD	N
14	South Street Family Frederick, MD	South Street Family, LLC 703.942.6610	Y	56	56	TBD	TBD	N
15	South Street Senior Frederick, MD	South Street Senior, LLC 703.942.6610	Y	96	96	TBD	TBD	N
16	Helena Crocker Residences Westford, MA	Helena Crocker Residences LP 978.535.5600	Y	18	18	TBD	TBD	N
17	Parkside at Main Simpsonville, SC	Parkside at Main, LP 703.942.6610	Y	42	42	2/17/2021	2/24/2021	N
18	Parkside at Hudson Gastonia, NC	Parkside at Hudson, LP 703.942.6610	Y	80	80	11/6/2020	9/15/2021	N
19	Dogwood Trail Albany, GA	Dogwood Trail Apartments, LP 703.942.6610	Y	64	61	12/31/2020	2/25/2022	N
20	Springhill Apartments Madison, FL	Springhill Apartments, LLC 703.942.6610	Y	76	76	12/20/2019	8/19/2022	N

\* Must have the ability to bind the LIHTC entity; document with partnership/operating agreements and one 8609 (per entity/development) for a total of 6.

1st PAGE

TOTAL: 1,630 1,606

LIHTC as % of  
99% Total Units

ADD ADDITIONAL PROPERTIES USING NEXT TAB

Previous Participation Certification continued

	Development Name/Location	Name of Ownership Entity and Phone Number	Controlling General Partner? (Y/N)	Total Units	Low Income Units	Placed in Service Date	8609 Date	Non-compliance Found? Y/N (Explain Yes)
21	Parkside at Drayton Spartanburg, SC	Parkside at Drayton, LP 703.942.6610	Y	41	41	4/1/2019	1/27/2020	N
22	Perrytown Apartments Perry, FL	Perrytown Apartments, LL 703.942.6610	Y	100	100	5/21/2018	12/22/2020	N
23	Momentum at Shady Grove Derwood, MD	Momentum Apartments, 703.942.6610	Y	110	110	10/18/2019	2/9/2021	N
24	Douglass Village Douglassville, GA	Douglass Village Apartm 703.942.6610	Y	88	88	12/20/2018	8/26/2021	N
25	Hand Trading Company Apartments Pelham, GA	Hand TC Restoration, LP 703.942.6610	Y	54	44	12/16/2019	2/2/2021	N
26	The Forge on Broadway Buffalo, NY	SAAKC Buffalo Forge, LLC 978.535.5600	Y	158	141	7/31/2020	1/28/2022	N
27	Castle Creek Aspen, CO	488 Castle Creek, LLC 703.942.6610	Y	24	24	3/20/2018	7/16/2019	N
28	Ashton Cove Kingsland, GA	Kingsland Cove, LP 703.942.6610	Y	72	72	9/27/2018	6/17/2019	N
29	St James Terrace Baltimore, MD	St. James Apartments LP 703.942.6610	Y	151	151	7/20/2018	3/13/2019	N
30	Chelmsford Wood Residences II Chelmsford, MA	Chelmsford Woods Resid 978.535.5600	Y	58	58	7/6/2018	3/19/2019	N
31	Parkside at Bethel Clover, SC	Parkside at Bethel LP 703.942.6610	Y	42	42	5/11/2018	2/25/2019	N
32	Market Station Thomasville, GA	Market Station Apartmen 703.942.6610	Y	80	80	3/31/2018	10/3/2018	N
33	Coady School Residences Bourne, MA	Coady School Residence 978.535.5600	Y	58	58	8/25/2017	5/8/2018	N
34	Page Woodson Oklahoma City, OK	Page Woodson Develop 703.942.6610	Y	128	128	7/14/2017	11/26/2018	N
35	Park Heights Baltimore, MD	New Park Heights LLC 703.942.6610	Y	100	100	6/30/2017	4/17/2018	N
36	Residences at Government Center I Fairfax, VA	Fairfax Corner Partners LL 703.942.6610	Y	150	15	2/28/2017	9/27/2017	N
37	Residences at Government Center II Fairfax, VA	Fairfax Corner Partners II 703.942.6610	Y	120	120	2/28/2017	10/19/2017	N
38	Southfork Camilla, GA	Southfork Apartments LP 703.942.6610	Y	96	96	8/25/2016	3/14/2017	N
39	Parkside at Boulevard Orangeburg, SC	Parkside at Boulevard LP 703.942.6610	Y	44	44	7/29/2016	1/27/2017	N
40	Cypress Parc New Orleans, LA	FBT Community Develop 703.942.6610	Y	62	62	5/31/2016	3/10/2017	N
41	Chelmsford Woods Residences Chelmsford, MA	Chelmsford Woods Resid 978.535.5300	Y	58	58	2/26/2016	10/5/2016	N
42	Eureka Heights Ashburn GA	Eureka Heights, LP 703.942.6610	Y	56	56	6/30/2015	3/3/2016	N
43	Tangi Village Hammond, LA	Quick Blvd. Apartments L 703.942.6610	Y	61	61	11/30/2014	11/6/2015	N
44	Simpkins School Yarmouth, MA	Simpkins School Residenc 978.535.5600	Y	65	58	9/29/2014	5/18/2015	N
45	Ashley House Valdosta, GA	Ashley House Apartments 703.942.6610	Y	61	61	8/1/2014	6/2/2015	N
46	Elm Drive Senior Apartments Baton Rouge, LA	Elm Drive Senior Apartme 703.942.6610	Y	60	60	5/1/2014	11/6/2015	N
47	The Reserve at Sugar Mill St. Marys, GA	Ashton Pines Apartments, 703.942.6610	Y	70	70	10/26/2012	10/17/2013	N
48	Griffin Heights Tallahassee, FL	New Griffin Apartments, L 703.942.6610	Y	100	100	22/23/2012	1/11/2013	N
49	Pine Meadow Gainesville, FL	Pine Meadow Redevelop 703.942.6610	Y	78	78	12/7/2011	6/14/2013	N
50	Sand Dunes Panama City Beach, FL	Sand Dunes Redevelopm 703.942.6610	Y	104	104	12/7/2011	6/14/2013	N
51	Cypress Place Marrero, LA	1500 Westwood, LP 703.942.6610	Y	132	132	11/7/2011	11/8/2013	N
52	Three Tree Flats Washington, DC	3910 Georgia Avenue As 703.942.6610	Y	130	119	2/25/2011	1/24/2012	N
53	Lakeside Columbia, SC	New Lakeside Apartment 703.942.6610	Y	110	109	12/2/2010	2/24/2011	N
54	School Street Residences Athol, MA	School Street Residences 978.535.5600	Y	50	50	12/1/2010	12/30/2011	N
55	Fulton School Weymouth, MA	Fulton School Residences 978.535.5600	Y	63	63	11/2/2009	12/31/2010	N
56	Appian Way North Charleston, SC	8465 Patriot Boulevard, L 703.942.6610	N	204	204	6/1/2009	6/12/2009	N

2nd PAGE TOTAL: 3,138 2,957

GRAND TOTAL: 4,768 4,563

LIHTC as % of  
96% Total Unit

# List of LIHTC Developments (Schedule A)



Development Name: Somos Phase B

Name of Applicant: Somos Phase B, LLC

## INSTRUCTIONS:

- 1 A Schedule A is required for every individual that makes up the GP or Managing Member - does not apply to principals of publicly traded corporations.
- 2 For each property for which an uncorrected 8823 has been issued, provide a detailed explanation of the nature of the non-compliance, as well as a status statement.
- 3 List only tax credit development experience since 2007 (i.e. for the past 15 years)
- 4 Use separate pages as needed, for each principal.

Principal's Name: SCG Development Manager, LLC Controlling GP (CGP) or 'Named' Managing Member of Proposed property? Y or N

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14	South Street Family Frederick, MD	South Street Family, LLC 703.942.6610	Y	56	56	TBD	TBD	N
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\* Must have the ability to bind the LIHTC entity; document with partnership/operating agreements and one 8609 (per entity/development) for a total of 6.

1st PAGE

TOTAL: 1,630 1,606

LIHTC as % of  
99% Total Units

ADD ADDITIONAL PROPERTIES USING NEXT TAB

Previous Participation Certification continued

	Development Name/Location	Name of Ownership Entity and Phone Number	Controlling General Partner? (Y/N)	Total Units	Low Income Units	Placed in Service Date	8609 Date	Non-compliance Found? Y/N (Explain Yes)
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22	Perrytown Apartments Perry, FL	Perrytown Apartments, LL 703.942.6610	Y	100	100	5/21/2018	12/22/2020	N
23	Momentum at Shady Grove Derwood, MD	Momentum Apartments, 703.942.6610	Y	110	110	10/18/2019	2/9/2021	N
24	Douglass Village Douglassville, GA	Douglass Village Apartm 703.942.6610	Y	88	88	12/20/2018	8/26/2021	N
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29	St James Terrace Baltimore, MD	St. James Apartments LP 703.942.6610	Y	151	151	7/20/2018	3/13/2019	N
30	Chelmsford Wood Residences II Chelmsford, MA	Chelmsford Woods Resid 978.535.5600	Y	58	58	7/6/2018	3/19/2019	N
31	Parkside at Bethel Clover, SC	Parkside at Bethel LP 703.942.6610	Y	42	42	5/11/2018	2/25/2019	N
32	Market Station Thomasville, GA	Market Station Apartmen 703.942.6610	Y	80	80	3/31/2018	10/3/2018	N
33	Coady School Residences Bourne, MA	Coady School Residence 978.535.5600	Y	58	58	8/25/2017	5/8/2018	N
34	Page Woodson Oklahoma City, OK	Page Woodson Develop 703.942.6610	Y	128	128	7/14/2017	11/26/2018	N
35	Park Heights Baltimore, MD	New Park Heights LLC 703.942.6610	Y	100	100	6/30/2017	4/17/2018	N
36	Residences at Government Center I Fairfax, VA	Fairfax Corner Partners LL 703.942.6610	Y	150	15	2/28/2017	9/27/2017	N
37	Residences at Government Center II Fairfax, VA	Fairfax Corner Partners II 703.942.6610	Y	120	120	2/28/2017	10/19/2017	N
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39	Parkside at Boulevard Orangeburg, SC	Parkside at Boulevard LP 703.942.6610	Y	44	44	7/29/2016	1/27/2017	N
40	Cypress Parc New Orleans, LA	FBT Community Develop 703.942.6610	Y	62	62	5/31/2016	3/10/2017	N
41	Chelmsford Woods Residences Chelmsford, MA	Chelmsford Woods Resid 978.535.5300	Y	58	58	2/26/2016	10/5/2016	N
42	Eureka Heights Ashburn GA	Eureka Heights, LP 703.942.6610	Y	56	56	6/30/2015	3/3/2016	N
43	Tangi Village Hammond, LA	Quick Blvd. Apartments L 703.942.6610	Y	61	61	11/30/2014	11/6/2015	N
44	Simpkins School Yarmouth, MA	Simpkins School Residenc 978.535.5600	Y	65	58	9/29/2014	5/18/2015	N
45	Ashley House Valdosta, GA	Ashley House Apartments 703.942.6610	Y	61	61	8/1/2014	6/2/2015	N
46	Elm Drive Senior Apartments Baton Rouge, LA	Elm Drive Senior Apartme 703.942.6610	Y	60	60	5/1/2014	11/6/2015	N
47	The Reserve at Sugar Mill St. Marys, GA	Ashton Pines Apartments, 703.942.6610	Y	70	70	10/26/2012	10/17/2013	N
48	Griffin Heights Tallahassee, FL	New Griffin Apartments, L 703.942.6610	Y	100	100	22/23/2012	1/11/2013	N
49	Pine Meadow Gainesville, FL	Pine Meadow Redevelop 703.942.6610	Y	78	78	12/7/2011	6/14/2013	N
50	Sand Dunes Panama City Beach, FL	Sand Dunes Redevelopm 703.942.6610	Y	104	104	12/7/2011	6/14/2013	N
51	Cypress Place Marrero, LA	1500 Westwood, LP 703.942.6610	Y	132	132	11/7/2011	11/8/2013	N
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53	Lakeside Columbia, SC	New Lakeside Apartment 703.942.6610	Y	110	109	12/2/2010	2/24/2011	N
54	School Street Residences Athol, MA	School Street Residences 978.535.5600	Y	50	50	12/1/2010	12/30/2011	N
55	Fulton School Weymouth, MA	Fulton School Residences 978.535.5600	Y	63	63	11/2/2009	12/31/2010	N
56	Appian Way North Charleston, SC	8465 Patriot Boulevard, L 703.942.6610	N	204	204	6/1/2009	6/12/2009	N

2nd PAGE TOTAL: 3,138 2,957

GRAND TOTAL: 4,768 4,563

LIHTC as % of  
96% Total Unit

# List of LIHTC Developments (Schedule A)



Development Name: Somos Phase B

Name of Applicant: Somos Phase B, LLC

## INSTRUCTIONS:

- 1 A Schedule A is required for every individual that makes up the GP or Managing Member - does not apply to principals of publicly traded corporations.
- 2 For each property for which an uncorrected 8823 has been issued, provide a detailed explanation of the nature of the non-compliance, as well as a status statement.
- 3 List only tax credit development experience since 2007 (i.e. for the past 15 years)
- 4 Use separate pages as needed, for each principal.

SCG Development Fund Investors, LLC  
Principal's Name:

Controlling GP (CGP) or 'Named' Managing Member of Proposed property? Y  
Y or N

	Development Name/Location	Name of Ownership Entity and Phone Number	CGP or 'Named' Managing Member at the time of dev.? (Y/N)*	Total Dev. Units	Total Low Income Units	Placed in Service Date	8609(s) Issue Date	Uncorrected 8823's? (Y/N) Explain "Y"
1	Coyle School Residences, LP Taunton, MA	Coyle School Residences 703.942.6610	Y	50	45	TBD	TBD	N
2	Ovata at Reedy Creek, LP Charlotte, NC	Ovata at Reedy Creek, LP 703.942.6610	Y	78	78	TBD	TBD	N
3	500 Northside Station Spartanburg, SC	Partans, LLC 703.942.6610	Y	90	81	7/30/2021	9/1/2022	N
4	Renaissance Place Greenville, SC	Renaissance Place, LP 703.942.6610	Y	57	57	10/11/2019	3/4/2022	N
5	Silver Creek Kensington, MD	Knowles Manor Senior Housing LLC 703.942.6610	Y	94	94	12/28/2021	7/31/2023	N
6	Parkside at Hickory Grove Charlotte, NC	Parkside at Hickory Grove, LP 703.942.6610	Y	80	80	10/1/2021	12/15/2022	N
7	Ovation at Arrowbrook I Herndon, VA	Arrowbrook Apartments I, LLC 703.942.6610	Y	126	126	3/30/2023	TBD	N
8	Ovation at Arrowbrook II Herndon, VA	Arrowbrook Apts II, LLC 703.942.6610	Y	148	148	4/14/2023	TBD	N
9	Oxford School Residences Fairhaven, MA	Oxford School Residences LP 978.535.5600	Y	52	45	6/13/2022	4/3/2023	N
10	One University Family Fairfax, VA	One University Family, LLC 703.942.6610	Y	120	120	TBD	TBD	N
11	One University Senior Fairfax, VA	One University Senior, LLC 703.942.6610	Y	120	120	TBD	TBD	N
12	Parkside at Butler Mauldin, SC	Parkside at Butler, LP 703.942.6610	Y	72	72	2/15/2023	TBD	N
13	Frederick Road Senior Housing Gaithersburg, MD	Frederick Road Senior 4% Owner LLC 703.942.6610	Y	111	111	TBD	TBD	N
14	South Street Family Frederick, MD	South Street Family, LLC 703.942.6610	Y	56	56	TBD	TBD	N
15	South Street Senior Frederick, MD	South Street Senior, LLC 703.942.6610	Y	96	96	TBD	TBD	N
16	Helena Crocker Residences Westford, MA	Helena Crocker Residences LP 978.535.5600	Y	18	18	TBD	TBD	N
17	Parkside at Main Simpsonville, SC	Parkside at Main, LP 703.942.6610	Y	42	42	2/17/2021	2/24/2021	N
18	Parkside at Hudson Gastonia, NC	Parkside at Hudson, LP 703.942.6610	Y	80	80	11/6/2020	9/15/2021	N
19	Dogwood Trail Albany, GA	Dogwood Trail Apartments, LP 703.942.6610	Y	64	61	12/31/2020	2/25/2022	N
20	Springhill Apartments Madison, FL	Springhill Apartments, LLC 703.942.6610	Y	76	76	12/20/2019	8/19/2022	N

\* Must have the ability to bind the LIHTC entity; document with partnership/operating agreements and one 8609 (per entity/development) for a total of 6.

1st PAGE

TOTAL: 1,630 1,606

LIHTC as % of  
99% Total Units

ADD ADDITIONAL PROPERTIES USING NEXT TAB

Previous Participation Certification continued

	Development Name/Location	Name of Ownership Entity and Phone Number	Controlling General Partner? (Y/N)	Total Units	Low Income Units	Placed in Service Date	8609 Date	Non-compliance Found? Y/N (Explain Yes)
21	Parkside at Drayton Spartanburg, SC	Parkside at Drayton, LP 703.942.6610	Y	41	41	4/1/2019	1/27/2020	N
22	Perrytown Apartments Perry, FL	Perrytown Apartments, LLC 703.942.6610	Y	100	100	5/21/2018	12/22/2020	N
23	Momentum at Shady Grove Derwood, MD	Momentum Apartments, 703.942.6610	Y	110	110	10/18/2019	2/9/2021	N
24	Douglass Village Douglassville, GA	Douglass Village Apartm 703.942.6610	Y	88	88	12/20/2018	8/26/2021	N
25	Hand Trading Company Apartments Pelham, GA	Hand TC Restoration, LP 703.942.6610	Y	54	44	12/16/2019	2/2/2021	N
26	The Forge on Broadway Buffalo, NY	SAAKC Buffalo Forge, LLC 978.535.5600	Y	158	141	7/31/2020	1/28/2022	N
27	Castle Creek Aspen, CO	488 Castle Creek, LLC 703.942.6610	Y	24	24	3/20/2018	7/16/2019	N
28	Ashton Cove Kingsland, GA	Kingsland Cove, LP 703.942.6610	Y	72	72	9/27/2018	6/17/2019	N
29	St James Terrace Baltimore, MD	St. James Apartments LP 703.942.6610	Y	151	151	7/20/2018	3/13/2019	N
30	Chelmsford Wood Residences II Chelmsford, MA	Chelmsford Woods Resid 978.535.5600	Y	58	58	7/6/2018	3/19/2019	N
31	Parkside at Bethel Clover, SC	Parkside at Bethel LP 703.942.6610	Y	42	42	5/11/2018	2/25/2019	N
32	Market Station Thomasville, GA	Market Station Apartmen 703.942.6610	Y	80	80	3/31/2018	10/3/2018	N
33	Coady School Residences Bourne, MA	Coady School Residence 978.535.5600	Y	58	58	8/25/2017	5/8/2018	N
34	Page Woodson Oklahoma City, OK	Page Woodson Develop 703.942.6610	Y	128	128	7/14/2017	11/26/2018	N
35	Park Heights Baltimore, MD	New Park Heights LLC 703.942.6610	Y	100	100	6/30/2017	4/17/2018	N
36	Residences at Government Center I Fairfax, VA	Fairfax Corner Partners LL 703.942.6610	Y	150	15	2/28/2017	9/27/2017	N
37	Residences at Government Center II Fairfax, VA	Fairfax Corner Partners II L 703.942.6610	Y	120	120	2/28/2017	10/19/2017	N
38	Southfork Camilla, GA	Southfork Apartments LP 703.942.6610	Y	96	96	8/25/2016	3/14/2017	N
39	Parkside at Boulevard Orangeburg, SC	Parkside at Boulevard LP 703.942.6610	Y	44	44	7/29/2016	1/27/2017	N
40	Cypress Parc New Orleans, LA	FBT Community Develop 703.942.6610	Y	62	62	5/31/2016	3/10/2017	N
41	Chelmsford Woods Residences Chelmsford, MA	Chelmsford Woods Resid 978.535.5300	Y	58	58	2/26/2016	10/5/2016	N
42	Eureka Heights Ashburn GA	Eureka Heights, LP 703.942.6610	Y	56	56	6/30/2015	3/3/2016	N
43	Tangi Village Hammond, LA	Quick Blvd. Apartments L 703.942.6610	Y	61	61	11/30/2014	11/6/2015	N
44	Simpkins School Yarmouth, MA	Simpkins School Residenc 978.535.5600	Y	65	58	9/29/2014	5/18/2015	N
45	Ashley House Valdosta, GA	Ashley House Apartments 703.942.6610	Y	61	61	8/1/2014	6/2/2015	N
46	Elm Drive Senior Apartments Baton Rouge, LA	Elm Drive Senior Apartme 703.942.6610	Y	60	60	5/1/2014	11/6/2015	N
47	The Reserve at Sugar Mill St. Marys, GA	Ashton Pines Apartments, 703.942.6610	Y	70	70	10/26/2012	10/17/2013	N
48	Griffin Heights Tallahassee, FL	New Griffin Apartments, L 703.942.6610	Y	100	100	22/23/2012	1/11/2013	N
49	Pine Meadow Gainesville, FL	Pine Meadow Redevelop 703.942.6610	Y	78	78	12/7/2011	6/14/2013	N
50	Sand Dunes Panama City Beach, FL	Sand Dunes Redevelopm 703.942.6610	Y	104	104	12/7/2011	6/14/2013	N
51	Cypress Place Marrero, LA	1500 Westwood, LP 703.942.6610	Y	132	132	11/7/2011	11/8/2013	N
52	Three Tree Flats Washington, DC	3910 Georgia Avenue As 703.942.6610	Y	130	119	2/25/2011	1/24/2012	N
53	Lakeside Columbia, SC	New Lakeside Apartment 703.942.6610	Y	110	109	12/2/2010	2/24/2011	N
54	School Street Residences Athol, MA	School Street Residences 978.535.5600	Y	50	50	12/1/2010	12/30/2011	N
55	Fulton School Weymouth, MA	Fulton School Residences 978.535.5600	Y	63	63	11/2/2009	12/31/2010	N
56	Appian Way North Charleston, SC	8465 Patriot Boulevard, L 703.942.6610	N	204	204	6/1/2009	6/12/2009	N

2nd PAGE TOTAL: 3,138 2,957

GRAND TOTAL: 4,768 4,563

LIHTC as % of  
96% Total Unit



# List of LIHTC Developments (Schedule A)



Development Name: Somos Phase B

Name of Applicant: Somos Phase B, LLC

## INSTRUCTIONS:

- 1 A Schedule A is required for every individual that makes up the GP or Managing Member - does not apply to principals of publicly traded corporations.
- 2 For each property for which an uncorrected 8823 has been issued, provide a detailed explanation of the nature of the non-compliance, as well as a status statement.
- 3 List only tax credit development experience since 2007 (i.e. for the past 15 years)
- 4 Use separate pages as needed, for each principal.

Principal's Name: SCG Capital Corp. Controlling GP (CGP) or 'Named' Managing Member of Proposed property? Y or N

	Development Name/Location	Name of Ownership Entity and Phone Number	CGP or 'Named' Managing Member at the time of dev.? (Y/N)*	Total Dev. Units	Total Low Income Units	Placed in Service Date	8609(s) Issue Date	Uncorrected 8823's? (Y/N) Explain "Y"
1	Coyle School Residences, LP Taunton, MA	Coyle School Residences 703.942.6610	Y	50	45	TBD	TBD	N
2	Ovata at Reedy Creek, LP Charlotte, NC	Ovata at Reedy Creek, LP 703.942.6610	Y	78	78	TBD	TBD	N
3	500 Northside Station Spartanburg, SC	Partans, LLC 703.942.6610	Y	90	81	7/30/2021	9/1/2022	N
4	Renaissance Place Greenville, SC	Renaissance Place, LP 703.942.6610	Y	57	57	10/11/2019	3/4/2022	N
5	Silver Creek Kensington, MD	Knowles Manor Senior Housing LLC 703.942.6610	Y	94	94	12/28/2021	7/31/2023	N
6	Parkside at Hickory Grove Charlotte, NC	Parkside at Hickory Grove, LP 703.942.6610	Y	80	80	10/1/2021	12/15/2022	N
7	Ovation at Arrowbrook I Herndon, VA	Arrowbrook Apartments I, LLC 703.942.6610	Y	126	126	3/30/2023	TBD	N
8	Ovation at Arrowbrook II Herndon, VA	Arrowbrook Apts II, LLC 703.942.6610	Y	148	148	4/14/2023	TBD	N
9	Oxford School Residences Fairhaven, MA	Oxford School Residences LP 978.535.5600	Y	52	45	6/13/2022	4/3/2023	N
10	One University Family Fairfax, VA	One University Family, LLC 703.942.6610	Y	120	120	TBD	TBD	N
11	One University Senior Fairfax, VA	One University Senior, LLC 703.942.6610	Y	120	120	TBD	TBD	N
12	Parkside at Butler Mauldin, SC	Parkside at Butler, LP 703.942.6610	Y	72	72	2/15/2023	TBD	N
13	Frederick Road Senior Housing Gaithersburg, MD	Frederick Road Senior 4% Owner LLC 703.942.6610	Y	111	111	TBD	TBD	N
14	South Street Family Frederick, MD	South Street Family, LLC 703.942.6610	Y	56	56	TBD	TBD	N
15	South Street Senior Frederick, MD	South Street Senior, LLC 703.942.6610	Y	96	96	TBD	TBD	N
16	Helena Crocker Residences Westford, MA	Helena Crocker Residences LP 978.535.5600	Y	18	18	TBD	TBD	N
17	Parkside at Main Simpsonville, SC	Parkside at Main, LP 703.942.6610	Y	42	42	2/17/2021	2/24/2021	N
18	Parkside at Hudson Gastonia, NC	Parkside at Hudson, LP 703.942.6610	Y	80	80	11/6/2020	9/15/2021	N
19	Dogwood Trail Albany, GA	Dogwood Trail Apartments, LP 703.942.6610	Y	64	61	12/31/2020	2/25/2022	N
20	Springhill Apartments Madison, FL	Springhill Apartments, LLC 703.942.6610	Y	76	76	12/20/2019	8/19/2022	N

\* Must have the ability to bind the LIHTC entity; document with partnership/operating agreements and one 8609 (per entity/development) for a total of 6.

1st PAGE

TOTAL: 1,630 1,606

LIHTC as % of  
99% Total Units

ADD ADDITIONAL PROPERTIES USING NEXT TAB

Previous Participation Certification continued

	Development Name/Location	Name of Ownership Entity and Phone Number	Controlling General Partner? (Y/N)	Total Units	Low Income Units	Placed in Service Date	8609 Date	Non-compliance Found? Y/N (Explain Yes)
21	Parkside at Drayton Spartanburg, SC	Parkside at Drayton, LP 703.942.6610	Y	41	41	4/1/2019	1/27/2020	N
22	Perrytown Apartments Perry, FL	Perrytown Apartments, LL 703.942.6610	Y	100	100	5/21/2018	12/22/2020	N
23	Momentum at Shady Grove Derwood, MD	Momentum Apartments, 703.942.6610	Y	110	110	10/18/2019	2/9/2021	N
24	Douglass Village Douglassville, GA	Douglass Village Apartm 703.942.6610	Y	88	88	12/20/2018	8/26/2021	N
25	Hand Trading Company Apartments Pelham, GA	Hand TC Restoration, LP 703.942.6610	Y	54	44	12/16/2019	2/2/2021	N
26	The Forge on Broadway Buffalo, NY	SAAKC Buffalo Forge, LLC 978.535.5600	Y	158	141	7/31/2020	1/28/2022	N
27	Castle Creek Aspen, CO	488 Castle Creek, LLC 703.942.6610	Y	24	24	3/20/2018	7/16/2019	N
28	Ashton Cove Kingsland, GA	Kingsland Cove, LP 703.942.6610	Y	72	72	9/27/2018	6/17/2019	N
29	St James Terrace Baltimore, MD	St. James Apartments LP 703.942.6610	Y	151	151	7/20/2018	3/13/2019	N
30	Chelmsford Wood Residences II Chelmsford, MA	Chelmsford Woods Resid 978.535.5600	Y	58	58	7/6/2018	3/19/2019	N
31	Parkside at Bethel Clover, SC	Parkside at Bethel LP 703.942.6610	Y	42	42	5/11/2018	2/25/2019	N
32	Market Station Thomasville, GA	Market Station Apartmen 703.942.6610	Y	80	80	3/31/2018	10/3/2018	N
33	Coady School Residences Bourne, MA	Coady School Residence 978.535.5600	Y	58	58	8/25/2017	5/8/2018	N
34	Page Woodson Oklahoma City, OK	Page Woodson Develop 703.942.6610	Y	128	128	7/14/2017	11/26/2018	N
35	Park Heights Baltimore, MD	New Park Heights LLC 703.942.6610	Y	100	100	6/30/2017	4/17/2018	N
36	Residences at Government Center I Fairfax, VA	Fairfax Corner Partners LL 703.942.6610	Y	150	15	2/28/2017	9/27/2017	N
37	Residences at Government Center II Fairfax, VA	Fairfax Corner Partners II L 703.942.6610	Y	120	120	2/28/2017	10/19/2017	N
38	Southfork Camilla, GA	Southfork Apartments LP 703.942.6610	Y	96	96	8/25/2016	3/14/2017	N
39	Parkside at Boulevard Orangeburg, SC	Parkside at Boulevard LP 703.942.6610	Y	44	44	7/29/2016	1/27/2017	N
40	Cypress Parc New Orleans, LA	FBT Community Develop 703.942.6610	Y	62	62	5/31/2016	3/10/2017	N
41	Chelmsford Woods Residences Chelmsford, MA	Chelmsford Woods Resid 978.535.5300	Y	58	58	2/26/2016	10/5/2016	N
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43	Tangi Village Hammond, LA	Quick Blvd. Apartments L 703.942.6610	Y	61	61	11/30/2014	11/6/2015	N
44	Simpkins School Yarmouth, MA	Simpkins School Residenc 978.535.5600	Y	65	58	9/29/2014	5/18/2015	N
45	Ashley House Valdosta, GA	Ashley House Apartments 703.942.6610	Y	61	61	8/1/2014	6/2/2015	N
46	Elm Drive Senior Apartments Baton Rouge, LA	Elm Drive Senior Apartme 703.942.6610	Y	60	60	5/1/2014	11/6/2015	N
47	The Reserve at Sugar Mill St. Marys, GA	Ashton Pines Apartments, 703.942.6610	Y	70	70	10/26/2012	10/17/2013	N
48	Griffin Heights Tallahassee, FL	New Griffin Apartments, L 703.942.6610	Y	100	100	22/23/2012	1/11/2013	N
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2nd PAGE TOTAL: 3,138 2,957

GRAND TOTAL: 4,768 4,563

LIHTC as % of  
96% Total Unit

# List of LIHTC Developments (Schedule A)



Development Name: Somos Phase B

Name of Applicant: Somos Phase B, LLC

## INSTRUCTIONS:

- 1 A Schedule A is required for every individual that makes up the GP or Managing Member - does not apply to principals of publicly traded corporations.
- 2 For each property for which an uncorrected 8823 has been issued, provide a detailed explanation of the nature of the non-compliance, as well as a status statement.
- 3 List only tax credit development experience since 2007 (i.e. for the past 15 years)
- 4 Use separate pages as needed, for each principal.

Principal's Name: SCG Development Co., LLC Controlling GP (CGP) or 'Named' Managing Member of Proposed property? Y or N

	Development Name/Location	Name of Ownership Entity and Phone Number	CGP or 'Named' Managing Member at the time of dev.? (Y/N)*	Total Dev. Units	Total Low Income Units	Placed in Service Date	8609(s) Issue Date	Uncorrected 8823's? (Y/N) Explain "Y"
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TOTAL: 1,630 1,606

LIHTC as % of  
99% Total Units

ADD ADDITIONAL PROPERTIES USING NEXT TAB

Previous Participation Certification continued

	Development Name/Location	Name of Ownership Entity and Phone Number	Controlling General Partner? (Y/N)	Total Units	Low Income Units	Placed in Service Date	8609 Date	Non-compliance Found? Y/N (Explain Yes)
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24	Douglass Village Douglassville, GA	Douglass Village Apartm 703.942.6610	Y	88	88	12/20/2018	8/26/2021	N
25	Hand Trading Company Apartments Pelham, GA	Hand TC Restoration, LP 703.942.6610	Y	54	44	12/16/2019	2/2/2021	N
26	The Forge on Broadway Buffalo, NY	SAAKC Buffalo Forge, LLC 978.535.5600	Y	158	141	7/31/2020	1/28/2022	N
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28	Ashton Cove Kingsland, GA	Kingsland Cove, LP 703.942.6610	Y	72	72	9/27/2018	6/17/2019	N
29	St James Terrace Baltimore, MD	St. James Apartments LP 703.942.6610	Y	151	151	7/20/2018	3/13/2019	N
30	Chelmsford Wood Residences II Chelmsford, MA	Chelmsford Woods Resid 978.535.5600	Y	58	58	7/6/2018	3/19/2019	N
31	Parkside at Bethel Clover, SC	Parkside at Bethel LP 703.942.6610	Y	42	42	5/11/2018	2/25/2019	N
32	Market Station Thomasville, GA	Market Station Apartmen 703.942.6610	Y	80	80	3/31/2018	10/3/2018	N
33	Coady School Residences Bourne, MA	Coady School Residence 978.535.5600	Y	58	58	8/25/2017	5/8/2018	N
34	Page Woodson Oklahoma City, OK	Page Woodson Develop 703.942.6610	Y	128	128	7/14/2017	11/26/2018	N
35	Park Heights Baltimore, MD	New Park Heights LLC 703.942.6610	Y	100	100	6/30/2017	4/17/2018	N
36	Residences at Government Center I Fairfax, VA	Fairfax Corner Partners LL 703.942.6610	Y	150	15	2/28/2017	9/27/2017	N
37	Residences at Government Center II Fairfax, VA	Fairfax Corner Partners II L 703.942.6610	Y	120	120	2/28/2017	10/19/2017	N
38	Southfork Camilla, GA	Southfork Apartments LP 703.942.6610	Y	96	96	8/25/2016	3/14/2017	N
39	Parkside at Boulevard Orangeburg, SC	Parkside at Boulevard LP 703.942.6610	Y	44	44	7/29/2016	1/27/2017	N
40	Cypress Parc New Orleans, LA	FBT Community Develop 703.942.6610	Y	62	62	5/31/2016	3/10/2017	N
41	Chelmsford Woods Residences Chelmsford, MA	Chelmsford Woods Resid 978.535.5300	Y	58	58	2/26/2016	10/5/2016	N
42	Eureka Heights Ashburn GA	Eureka Heights, LP 703.942.6610	Y	56	56	6/30/2015	3/3/2016	N
43	Tangi Village Hammond, LA	Quick Blvd. Apartments L 703.942.6610	Y	61	61	11/30/2014	11/6/2015	N
44	Simpkins School Yarmouth, MA	Simpkins School Residenc 978.535.5600	Y	65	58	9/29/2014	5/18/2015	N
45	Ashley House Valdosta, GA	Ashley House Apartments 703.942.6610	Y	61	61	8/1/2014	6/2/2015	N
46	Elm Drive Senior Apartments Baton Rouge, LA	Elm Drive Senior Apartme 703.942.6610	Y	60	60	5/1/2014	11/6/2015	N
47	The Reserve at Sugar Mill St. Marys, GA	Ashton Pines Apartments, 703.942.6610	Y	70	70	10/26/2012	10/17/2013	N
48	Griffin Heights Tallahassee, FL	New Griffin Apartments, L 703.942.6610	Y	100	100	22/23/2012	1/11/2013	N
49	Pine Meadow Gainesville, FL	Pine Meadow Redevelop 703.942.6610	Y	78	78	12/7/2011	6/14/2013	N
50	Sand Dunes Panama City Beach, FL	Sand Dunes Redevelopm 703.942.6610	Y	104	104	12/7/2011	6/14/2013	N
51	Cypress Place Marrero, LA	1500 Westwood, LP 703.942.6610	Y	132	132	11/7/2011	11/8/2013	N
52	Three Tree Flats Washington, DC	3910 Georgia Avenue As 703.942.6610	Y	130	119	2/25/2011	1/24/2012	N
53	Lakeside Columbia, SC	New Lakeside Apartment 703.942.6610	Y	110	109	12/2/2010	2/24/2011	N
54	School Street Residences Athol, MA	School Street Residences 978.535.5600	Y	50	50	12/1/2010	12/30/2011	N
55	Fulton School Weymouth, MA	Fulton School Residences 978.535.5600	Y	63	63	11/2/2009	12/31/2010	N
56	Appian Way North Charleston, SC	8465 Patriot Boulevard, L 703.942.6610	N	204	204	6/1/2009	6/12/2009	N

2nd PAGE TOTAL: 3,138 2,957

GRAND TOTAL: 4,768 4,563

LIHTC as % of  
96% Total Unit

# List of LIHTC Developments (Schedule A)



Development Name: Somos Phase B

Name of Applicant: Somos Phase B, LLC

## INSTRUCTIONS:

- 1 A Schedule A is required for every individual that makes up the GP or Managing Member - does not apply to principals of publicly traded corporations.
- 2 For each property for which an uncorrected 8823 has been issued, provide a detailed explanation of the nature of the non-compliance, as well as a status statement.
- 3 List only tax credit development experience since 2007 (i.e. for the past 15 years)
- 4 Use separate pages as needed, for each principal.

SCG Development Fund MM, LLC

Controlling GP (CGP) or 'Named' Managing Member of Proposed property? Y or N

Principal's Name:

	Development Name/Location	Name of Ownership Entity and Phone Number	CGP or 'Named' Managing Member at the time of dev. (Y/N)*	Total Dev. Units	Total Low Income Units	Placed in Service Date	8609(s) Issue Date	Uncorrected 8823's? (Y/N) Explain "Y"
1	Coyle School Residences, LP Taunton, MA	Coyle School Residences 703.942.6610	Y	50	45	TBD	TBD	N
2	Ovata at Reedy Creek, LP Charlotte, NC	Ovata at Reedy Creek, LP 703.942.6610	Y	78	78	TBD	TBD	N
3	500 Northside Station Spartanburg, SC	Partans, LLC 703.942.6610	Y	90	81	7/30/2021	9/1/2022	N
4	Renaissance Place Greenville, SC	Renaissance Place, LP 703.942.6610	Y	57	57	10/11/2019	3/4/2022	N
5	Silver Creek Kensington, MD	Knowles Manor Senior Housing LLC 703.942.6610	Y	94	94	12/28/2021	7/31/2023	N
6	Parkside at Hickory Grove Charlotte, NC	Parkside at Hickory Grove, LP 703.942.6610	Y	80	80	10/1/2021	12/15/2022	N
7	Ovation at Arrowbrook I Herndon, VA	Arrowbrook Apartments I, LLC 703.942.6610	Y	126	126	3/30/2023	TBD	N
8	Ovation at Arrowbrook II Herndon, VA	Arrowbrook Apts II, LLC 703.942.6610	Y	148	148	4/14/2023	TBD	N
9	Oxford School Residences Fairhaven, MA	Oxford School Residences LP 978.535.5600	Y	52	45	6/13/2022	4/3/2023	N
10	One University Family Fairfax, VA	One University Family, LLC 703.942.6610	Y	120	120	TBD	TBD	N
11	One University Senior Fairfax, VA	One University Senior, LLC 703.942.6610	Y	120	120	TBD	TBD	N
12	Parkside at Butler Mauldin, SC	Parkside at Butler, LP 703.942.6610	Y	72	72	2/15/2023	TBD	N
13	Frederick Road Senior Housing Gaithersburg, MD	Frederick Road Senior 4% Owner LLC 703.942.6610	Y	111	111	TBD	TBD	N
14	South Street Family Frederick, MD	South Street Family, LLC 703.942.6610	Y	56	56	TBD	TBD	N
15	South Street Senior Frederick, MD	South Street Senior, LLC 703.942.6610	Y	96	96	TBD	TBD	N
16	Helena Crocker Residences Westford, MA	Helena Crocker Residences LP 978.535.5600	Y	18	18	TBD	TBD	N
17	Parkside at Main Simpsonville, SC	Parkside at Main, LP 703.942.6610	Y	42	42	2/17/2021	2/24/2021	N
18	Parkside at Hudson Gastonia, NC	Parkside at Hudson, LP 703.942.6610	Y	80	80	11/6/2020	9/15/2021	N
19	Dogwood Trail Albany, GA	Dogwood Trail Apartments, LP 703.942.6610	Y	64	61	12/31/2020	2/25/2022	N
20	Springhill Apartments Madison, FL	Springhill Apartments, LLC 703.942.6610	Y	76	76	12/20/2019	8/19/2022	N
21	Parkside at Drayton Spartanburg, SC	Parkside at Drayton, LP 703.942.6610	Y	41	41	4/1/2019	1/27/2020	N
22	Perrytown Apartments Perry, FL	Perrytown Apartments, LLC 703.942.6610	Y	100	100	5/21/2018	12/22/2020	N

ADD ADDITIONAL PROPERTIES USING NEXT TAB

Previous Participation Certification continued

	Development Name/Location	Name of Ownership Entity and Phone Number	Controlling General Partner? (Y/N)	Total Units	Low Income Units	Placed in Service Date	8609 Date	Non-compliance Found? Y/N (Explain Yes)
41	Chelmsford Woods Residences	Chelmsford Woods Residences	Y	58	58	2/26/2016	10/5/2016	N
	Chelmsford, MA	978.535.5300						
42	Eureka Heights	Eureka Heights, LP	Y	56	56	6/30/2015	3/3/2016	N
	Ashburn GA	703.942.6610						
43	Tangi Village	Quick Blvd. Apartments LP	Y	61	61	11/30/2014	11/6/2015	N
	Hammond, LA	703.942.6610						
44	Simpkins School	Simpkins School Residences, LP	Y	65	58	9/29/2014	5/18/2015	N
	Yarmouth, MA	978.535.5600						
45	Ashley House	Ashley House Apartments, LP	Y	61	61	8/1/2014	6/2/2015	N
	Valdosta, GA	703.942.6610						
	Elm Drive Senior Apartments	Elm Drive Senior Apartments, LP	Y	60	60	5/1/2014	11/6/2015	N
46	Baton Rouge, LA	703.942.6610						
47	The Reserve at Sugar Mill	Sugar Mill Pines Apartments, LP	Y	70	70	10/26/2012	10/17/2013	N
	St. Marys, GA	703.942.6610						
48	Griffin Heights	New Griffin Apartments, LP	Y	100	100	22/23/2012	1/11/2013	N
	Tallahassee, FL	703.942.6610						
49	Pine Meadow	Pine Meadow Redevelopment, LP	Y	78	78	12/7/2011	6/14/2013	N
	Gainesville, FL	703.942.6610						
50	Sand Dunes	Sand Dunes Redevelopment, LP	Y	104	104	12/7/2011	6/14/2013	N
	Panama City Beach, FL	703.942.6610						
51	Cypress Place	1500 Westwood, LP	Y	132	132	11/7/2011	11/8/2013	N
	Marrero, LA	703.942.6610						
52	Three Tree Flats	Georgia Avenue Associates	Y	130	119	2/25/2011	1/24/2012	N
	Washington, DC	703.942.6610						
53	Lakeside	New Lakeside Apartments, LP	Y	110	109	12/2/2010	2/24/2011	N
	Columbia, SC	703.942.6610						
54	School Street Residences	School Street Residences, LP	Y	50	50	12/1/2010	12/30/2011	N
	Athol, MA	978.535.5600						
55	Fulton School	Fulton School Residences, LP	Y	63	63	11/2/2009	12/31/2010	N
	Weymouth, MA	978.535.5600						
56	Appian Way	8465 Patriot Boulevard, LP	N	204	204	6/1/2009	6/12/2009	N
	North Charleston, SC	703.942.6610						
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2nd PAGE TOTAL: 1,402 1,383

GRAND TOTAL: #REF! #REF!

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LIHTC as % of  
Total Unit

# List of LIHTC Developments (Schedule A)



Development Name: Somos Phase B

Name of Applicant: Somos Phase B, LLC

## INSTRUCTIONS:

- 1 A Schedule A is required for every individual that makes up the GP or Managing Member - does not apply to principals of publicly traded corporations.
- 2 For each property for which an uncorrected 8823 has been issued, provide a detailed explanation of the nature of the non-compliance, as well as a status statement.
- 3 List only tax credit development experience since 2007 (i.e. for the past 15 years)
- 4 Use separate pages as needed, for each principal.

Principal's Name: Jason Duguay Controlling GP (CGP) or 'Named' Managing Member of Proposed property? Y or N

	Development Name/Location	Name of Ownership Entity and Phone Number	CGP or 'Named' Managing Member at the time of dev.? (Y/N)*	Total Dev. Units	Total Low Income Units	Placed in Service Date	8609(s) Issue Date	Uncorrected 8823's? (Y/N) Explain "Y"
1	Coyle School Residences, LP Taunton, MA	Coyle School Residences 703.942.6610	Y	50	45	TBD	TBD	N
2	Ovata at Reedy Creek, LP Charlotte, NC	Ovata at Reedy Creek, LP 703.942.6610	Y	78	78	TBD	TBD	N
3	500 Northside Station Spartanburg, SC	Partans, LLC 703.942.6610	Y	90	81	7/30/2021	9/1/2022	N
4	Renaissance Place Greenville, SC	Renaissance Place, LP 703.942.6610	Y	57	57	10/11/2019	3/4/2022	N
5	Silver Creek Kensington, MD	Knowles Manor Senior Housing LLC 703.942.6610	Y	94	94	12/28/2021	7/31/2023	N
6	Parkside at Hickory Grove Charlotte, NC	Parkside at Hickory Grove, LP 703.942.6610	Y	80	80	10/1/2021	12/15/2022	N
7	Ovation at Arrowbrook I Herndon, VA	Arrowbrook Apartments I, LLC 703.942.6610	Y	126	126	3/30/2023	TBD	N
8	Ovation at Arrowbrook II Herndon, VA	Arrowbrook Apts II, LLC 703.942.6610	Y	148	148	4/14/2023	TBD	N
9	Oxford School Residences Fairhaven, MA	Oxford School Residences LP 978.535.5600	Y	52	45	6/13/2022	4/3/2023	N
10	One University Family Fairfax, VA	One University Family, LLC 703.942.6610	Y	120	120	TBD	TBD	N
11	One University Senior Fairfax, VA	One University Senior, LLC 703.942.6610	Y	120	120	TBD	TBD	N
12	Parkside at Butler Mauldin, SC	Parkside at Butler, LP 703.942.6610	Y	72	72	2/15/2023	TBD	N
13	Frederick Road Senior Housing Gaithersburg, MD	Frederick Road Senior 4% Owner LLC 703.942.6610	Y	111	111	TBD	TBD	N
14	South Street Family Frederick, MD	South Street Family, LLC 703.942.6610	Y	56	56	TBD	TBD	N
15	South Street Senior Frederick, MD	South Street Senior, LLC 703.942.6610	Y	96	96	TBD	TBD	N
16	Helena Crocker Residences Westford, MA	Helena Crocker Residences LP 978.535.5600	Y	18	18	TBD	TBD	N
17	Parkside at Main Simpsonville, SC	Parkside at Main, LP 703.942.6610	Y	42	42	2/17/2021	2/24/2021	N
18	Parkside at Hudson Gastonia, NC	Parkside at Hudson, LP 703.942.6610	Y	80	80	11/6/2020	9/15/2021	N
19	Dogwood Trail Albany, GA	Dogwood Trail Apartments, LP 703.942.6610	Y	64	61	12/31/2020	2/25/2022	N
20	Springhill Apartments Madison, FL	Springhill Apartments, LLC 703.942.6610	Y	76	76	12/20/2019	8/19/2022	N

\* Must have the ability to bind the LIHTC entity; document with partnership/operating agreements and one 8609 (per entity/development) for a total of 6.

1st PAGE

TOTAL: 1,630 1,606

LIHTC as % of  
99% Total Units

ADD ADDITIONAL PROPERTIES USING NEXT TAB

Previous Participation Certification continued

	Development Name/Location	Name of Ownership Entity and Phone Number	Controlling General Partner? (Y/N)	Total Units	Low Income Units	Placed in Service Date	8609 Date	Non-compliance Found? Y/N (Explain Yes)
21	Parkside at Drayton Spartanburg, SC	Parkside at Drayton, LP 703.942.6610	Y	41	41	4/1/2019	1/27/2020	N
22	Perrytown Apartments Perry, FL	Perrytown Apartments, LLC 703.942.6610	Y	100	100	5/21/2018	12/22/2020	N
23	Momentum at Shady Grove Derwood, MD	Momentum Apartments, 703.942.6610	Y	110	110	10/18/2019	2/9/2021	N
24	Douglass Village Douglassville, GA	Douglass Village Apartm 703.942.6610	Y	88	88	12/20/2018	8/26/2021	N
25	Hand Trading Company Apartments Pelham, GA	Hand TC Restoration, LP 703.942.6610	Y	54	44	12/16/2019	2/2/2021	N
26	The Forge on Broadway Buffalo, NY	SAAKC Buffalo Forge, LLC 978.535.5600	Y	158	141	7/31/2020	1/28/2022	N
27	Castle Creek Aspen, CO	488 Castle Creek, LLC 703.942.6610	Y	24	24	3/20/2018	7/16/2019	N
28	Ashton Cove Kingsland, GA	Kingsland Cove, LP 703.942.6610	Y	72	72	9/27/2018	6/17/2019	N
29	St James Terrace Baltimore, MD	St. James Apartments LP 703.942.6610	Y	151	151	7/20/2018	3/13/2019	N
30	Chelmsford Wood Residences II Chelmsford, MA	Chelmsford Woods Resid 978.535.5600	Y	58	58	7/6/2018	3/19/2019	N
31	Parkside at Bethel Clover, SC	Parkside at Bethel LP 703.942.6610	Y	42	42	5/11/2018	2/25/2019	N
32	Market Station Thomasville, GA	Market Station Apartmen 703.942.6610	Y	80	80	3/31/2018	10/3/2018	N
33	Coady School Residences Bourne, MA	Coady School Residence 978.535.5600	Y	58	58	8/25/2017	5/8/2018	N
34	Page Woodson Oklahoma City, OK	Page Woodson Develop 703.942.6610	Y	128	128	7/14/2017	11/26/2018	N
35	Park Heights Baltimore, MD	New Park Heights LLC 703.942.6610	Y	100	100	6/30/2017	4/17/2018	N
36	Residences at Government Center I Fairfax, VA	Fairfax Corner Partners LL 703.942.6610	Y	150	15	2/28/2017	9/27/2017	N
37	Residences at Government Center II Fairfax, VA	Fairfax Corner Partners II L 703.942.6610	Y	120	120	2/28/2017	10/19/2017	N
38	Southfork Camilla, GA	Southfork Apartments LP 703.942.6610	Y	96	96	8/25/2016	3/14/2017	N
39	Parkside at Boulevard Orangeburg, SC	Parkside at Boulevard LP 703.942.6610	Y	44	44	7/29/2016	1/27/2017	N
40	Cypress Parc New Orleans, LA	FBT Community Develop 703.942.6610	Y	62	62	5/31/2016	3/10/2017	N
41	Chelmsford Woods Residences Chelmsford, MA	Chelmsford Woods Resid 978.535.5300	Y	58	58	2/26/2016	10/5/2016	N
42	Eureka Heights Ashburn GA	Eureka Heights, LP 703.942.6610	Y	56	56	6/30/2015	3/3/2016	N
43	Tangi Village Hammond, LA	Quick Blvd. Apartments L 703.942.6610	Y	61	61	11/30/2014	11/6/2015	N
44	Simpkins School Yarmouth, MA	Simpkins School Residenc 978.535.5600	Y	65	58	9/29/2014	5/18/2015	N
45	Ashley House Valdosta, GA	Ashley House Apartments 703.942.6610	Y	61	61	8/1/2014	6/2/2015	N
46	Elm Drive Senior Apartments Baton Rouge, LA	Elm Drive Senior Apartme 703.942.6610	Y	60	60	5/1/2014	11/6/2015	N
47	The Reserve at Sugar Mill St. Marys, GA	Ashton Pines Apartments, 703.942.6610	Y	70	70	10/26/2012	10/17/2013	N
48	Griffin Heights Tallahassee, FL	New Griffin Apartments, L 703.942.6610	Y	100	100	22/23/2012	1/11/2013	N
49	Pine Meadow Gainesville, FL	Pine Meadow Redevelop 703.942.6610	Y	78	78	12/7/2011	6/14/2013	N
50	Sand Dunes Panama City Beach, FL	Sand Dunes Redevelopm 703.942.6610	Y	104	104	12/7/2011	6/14/2013	N
51	Cypress Place Marrero, LA	1500 Westwood, LP 703.942.6610	Y	132	132	11/7/2011	11/8/2013	N
52	Three Tree Flats Washington, DC	3910 Georgia Avenue As 703.942.6610	Y	130	119	2/25/2011	1/24/2012	N
53	Lakeside Columbia, SC	New Lakeside Apartment 703.942.6610	Y	110	109	12/2/2010	2/24/2011	N
54	School Street Residences Athol, MA	School Street Residences 978.535.5600	Y	50	50	12/1/2010	12/30/2011	N
55	Fulton School Weymouth, MA	Fulton School Residences 978.535.5600	Y	63	63	11/2/2009	12/31/2010	N
56	Appian Way North Charleston, SC	8465 Patriot Boulevard, L 703.942.6610	N	204	204	6/1/2009	6/12/2009	N

2nd PAGE TOTAL: 3,138 2,957

GRAND TOTAL: 4,768 4,563

LIHTC as % of  
96% Total Unit



# List of LIHTC Developments (Schedule A)



Development Name: Somos Phase B

Name of Applicant: Somos Phase B, LLC

## INSTRUCTIONS:

- 1 A Schedule A is required for every individual that makes up the GP or Managing Member - does not apply to principals of publicly traded corporations.
- 2 For each property for which an uncorrected 8823 has been issued, provide a detailed explanation of the nature of the non-compliance, as well as a status statement.
- 3 List only tax credit development experience since 2007 (i.e. for the past 15 years)
- 4 Use separate pages as needed, for each principal.

Principal's Name: John M. Nelson, IV Controlling GP (CGP) or 'Named' Managing Member of Proposed property? Y or N

	Development Name/Location	Name of Ownership Entity and Phone Number	CGP or 'Named' Managing Member at the time of dev.? (Y/N)*	Total Dev. Units	Total Low Income Units	Placed in Service Date	8609(s) Issue Date	Uncorrected 8823's? (Y/N) Explain "Y"
1	Coyle School Residences, LP Taunton, MA	Coyle School Residences 703.942.6610	Y	50	45	TBD	TBD	N
2	Ovata at Reedy Creek, LP Charlotte, NC	Ovata at Reedy Creek, LP 703.942.6610	Y	78	78	TBD	TBD	N
3	500 Northside Station Spartanburg, SC	Partans, LLC 703.942.6610	Y	90	81	7/30/2021	9/1/2022	N
4	Renaissance Place Greenville, SC	Renaissance Place, LP 703.942.6610	Y	57	57	10/11/2019	3/4/2022	N
5	Silver Creek Kensington, MD	Knowles Manor Senior Housing LLC 703.942.6610	Y	94	94	12/28/2021	7/31/2023	N
6	Parkside at Hickory Grove Charlotte, NC	Parkside at Hickory Grove, LP 703.942.6610	Y	80	80	10/1/2021	12/15/2022	N
7	Ovation at Arrowbrook I Herndon, VA	Arrowbrook Apartments I, LLC 703.942.6610	Y	126	126	3/30/2023	TBD	N
8	Ovation at Arrowbrook II Herndon, VA	Arrowbrook Apts II, LLC 703.942.6610	Y	148	148	4/14/2023	TBD	N
9	Oxford School Residences Fairhaven, MA	Oxford School Residences LP 978.535.5600	Y	52	45	6/13/2022	4/3/2023	N
10	One University Family Fairfax, VA	One University Family, LLC 703.942.6610	Y	120	120	TBD	TBD	N
11	One University Senior Fairfax, VA	One University Senior, LLC 703.942.6610	Y	120	120	TBD	TBD	N
12	Parkside at Butler Mauldin, SC	Parkside at Butler, LP 703.942.6610	Y	72	72	2/15/2023	TBD	N
13	Frederick Road Senior Housing Gaithersburg, MD	Frederick Road Senior 4% Owner LLC 703.942.6610	Y	111	111	TBD	TBD	N
14	South Street Family Frederick, MD	South Street Family, LLC 703.942.6610	Y	56	56	TBD	TBD	N
15	South Street Senior Frederick, MD	South Street Senior, LLC 703.942.6610	Y	96	96	TBD	TBD	N
16	Helena Crocker Residences Westford, MA	Helena Crocker Residences LP 978.535.5600	Y	18	18	TBD	TBD	N
17	Parkside at Main Simpsonville, SC	Parkside at Main, LP 703.942.6610	Y	42	42	2/17/2021	2/24/2021	N
18	Parkside at Hudson Gastonia, NC	Parkside at Hudson, LP 703.942.6610	Y	80	80	11/6/2020	9/15/2021	N
19	Dogwood Trail Albany, GA	Dogwood Trail Apartments, LP 703.942.6610	Y	64	61	12/31/2020	2/25/2022	N
20	Springhill Apartments Madison, FL	Springhill Apartments, LLC 703.942.6610	Y	76	76	12/20/2019	8/19/2022	N

\* Must have the ability to bind the LIHTC entity; document with partnership/operating agreements and one 8609 (per entity/development) for a total of 6.

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TOTAL: 1,630 1,606

LIHTC as % of  
99% Total Units

ADD ADDITIONAL PROPERTIES USING NEXT TAB

Previous Participation Certification continued

	Development Name/Location	Name of Ownership Entity and Phone Number	Controlling General Partner? (Y/N)	Total Units	Low Income Units	Placed in Service Date	8609 Date	Non-compliance Found? Y/N (Explain Yes)
21	Parkside at Drayton Spartanburg, SC	Parkside at Drayton, LP 703.942.6610	Y	41	41	4/1/2019	1/27/2020	N
22	Perrytown Apartments Perry, FL	Perrytown Apartments, LL 703.942.6610	Y	100	100	5/21/2018	12/22/2020	N
23	Momentum at Shady Grove Derwood, MD	Momentum Apartments, 703.942.6610	Y	110	110	10/18/2019	2/9/2021	N
24	Douglass Village Douglassville, GA	Douglass Village Apartm 703.942.6610	Y	88	88	12/20/2018	8/26/2021	N
25	Hand Trading Company Apartments Pelham, GA	Hand TC Restoration, LP 703.942.6610	Y	54	44	12/16/2019	2/2/2021	N
26	The Forge on Broadway Buffalo, NY	SAAKC Buffalo Forge, LLC 978.535.5600	Y	158	141	7/31/2020	1/28/2022	N
27	Castle Creek Aspen, CO	488 Castle Creek, LLC 703.942.6610	Y	24	24	3/20/2018	7/16/2019	N
28	Ashton Cove Kingsland, GA	Kingsland Cove, LP 703.942.6610	Y	72	72	9/27/2018	6/17/2019	N
29	St James Terrace Baltimore, MD	St. James Apartments LP 703.942.6610	Y	151	151	7/20/2018	3/13/2019	N
30	Chelmsford Wood Residences II Chelmsford, MA	Chelmsford Woods Resid 978.535.5600	Y	58	58	7/6/2018	3/19/2019	N
31	Parkside at Bethel Clover, SC	Parkside at Bethel LP 703.942.6610	Y	42	42	5/11/2018	2/25/2019	N
32	Market Station Thomasville, GA	Market Station Apartmen 703.942.6610	Y	80	80	3/31/2018	10/3/2018	N
33	Coady School Residences Bourne, MA	Coady School Residence 978.535.5600	Y	58	58	8/25/2017	5/8/2018	N
34	Page Woodson Oklahoma City, OK	Page Woodson Develop 703.942.6610	Y	128	128	7/14/2017	11/26/2018	N
35	Park Heights Baltimore, MD	New Park Heights LLC 703.942.6610	Y	100	100	6/30/2017	4/17/2018	N
36	Residences at Government Center I Fairfax, VA	Fairfax Corner Partners LL 703.942.6610	Y	150	15	2/28/2017	9/27/2017	N
37	Residences at Government Center II Fairfax, VA	Fairfax Corner Partners II 703.942.6610	Y	120	120	2/28/2017	10/19/2017	N
38	Southfork Camilla, GA	Southfork Apartments LP 703.942.6610	Y	96	96	8/25/2016	3/14/2017	N
39	Parkside at Boulevard Orangeburg, SC	Parkside at Boulevard LP 703.942.6610	Y	44	44	7/29/2016	1/27/2017	N
40	Cypress Parc New Orleans, LA	FBT Community Develop 703.942.6610	Y	62	62	5/31/2016	3/10/2017	N
41	Chelmsford Woods Residences Chelmsford, MA	Chelmsford Woods Resid 978.535.5300	Y	58	58	2/26/2016	10/5/2016	N
42	Eureka Heights Ashburn GA	Eureka Heights, LP 703.942.6610	Y	56	56	6/30/2015	3/3/2016	N
43	Tangi Village Hammond, LA	Quick Blvd. Apartments L 703.942.6610	Y	61	61	11/30/2014	11/6/2015	N
44	Simpkins School Yarmouth, MA	Simpkins School Residenc 978.535.5600	Y	65	58	9/29/2014	5/18/2015	N
45	Ashley House Valdosta, GA	Ashley House Apartments 703.942.6610	Y	61	61	8/1/2014	6/2/2015	N
46	Elm Drive Senior Apartments Baton Rouge, LA	Elm Drive Senior Apartme 703.942.6610	Y	60	60	5/1/2014	11/6/2015	N
47	The Reserve at Sugar Mill St. Marys, GA	Ashton Pines Apartments, 703.942.6610	Y	70	70	10/26/2012	10/17/2013	N
48	Griffin Heights Tallahassee, FL	New Griffin Apartments, L 703.942.6610	Y	100	100	22/23/2012	1/11/2013	N
49	Pine Meadow Gainesville, FL	Pine Meadow Redevelop 703.942.6610	Y	78	78	12/7/2011	6/14/2013	N
50	Sand Dunes Panama City Beach, FL	Sand Dunes Redevelopm 703.942.6610	Y	104	104	12/7/2011	6/14/2013	N
51	Cypress Place Marrero, LA	1500 Westwood, LP 703.942.6610	Y	132	132	11/7/2011	11/8/2013	N
52	Three Tree Flats Washington, DC	3910 Georgia Avenue As 703.942.6610	Y	130	119	2/25/2011	1/24/2012	N
53	Lakeside Columbia, SC	New Lakeside Apartment 703.942.6610	Y	110	109	12/2/2010	2/24/2011	N
54	School Street Residences Athol, MA	School Street Residences 978.535.5600	Y	50	50	12/1/2010	12/30/2011	N
55	Fulton School Weymouth, MA	Fulton School Residences 978.535.5600	Y	63	63	11/2/2009	12/31/2010	N
56	Appian Way North Charleston, SC	8465 Patriot Boulevard, L 703.942.6610	N	204	204	6/1/2009	6/12/2009	N

2nd PAGE TOTAL: 3,138 2,957

GRAND TOTAL: 4,768 4,563

LIHTC as % of  
96% Total Unit

# List of LIHTC Developments (Schedule A)



Development Name: Somos Phase B

Name of Applicant: Somos Phase B, LLC

## INSTRUCTIONS:

- 1 A Schedule A is required for **every** individual that makes up the GP or Managing Member - does not apply to principals of publicly traded corporations.
- 2 For each property for which an uncorrected 8823 has been issued, provide a detailed explanation of the nature of the non-compliance, as well as a status statement.
- 3 List only tax credit development experience since 2007 (i.e. for the past 15 years)
- 4 Use separate pages as needed, for each principal.

Principal's Name: Benjamin D. Mottola Controlling GP (CGP) or 'Named' Managing Member of Proposed property? Y or N

	Development Name/Location	Name of Ownership Entity and Phone Number	CGP or 'Named' Managing Member at the time of dev.? (Y/N)*	Total Dev. Units	Total Low Income Units	Placed in Service Date	8609(s) Issue Date	Uncorrected 8823's? (Y/N) Explain "Y"
1	Coyle School Residences, LP Taunton, MA	Coyle School Residences 703.942.6610	Y	50	45	TBD	TBD	N
2	Ovata at Reedy Creek, LP Charlotte, NC	Ovata at Reedy Creek, LP 703.942.6610	Y	78	78	TBD	TBD	N
3	500 Northside Station Spartanburg, SC	Partans, LLC 703.942.6610	Y	90	81	7/30/2021	9/1/2022	N
4	Renaissance Place Greenville, SC	Renaissance Place, LP 703.942.6610	Y	57	57	10/11/2019	3/4/2022	N
5	Silver Creek Kensington, MD	Knowles Manor Senior Housing LLC 703.942.6610	Y	94	94	12/28/2021	7/31/2023	N
6	Parkside at Hickory Grove Charlotte, NC	Parkside at Hickory Grove, LP 703.942.6610	Y	80	80	10/1/2021	12/15/2022	N
7	Ovation at Arrowbrook I Herndon, VA	Arrowbrook Apartments I, LLC 703.942.6610	Y	126	126	3/30/2023	TBD	N
8	Ovation at Arrowbrook II Herndon, VA	Arrowbrook Apts II, LLC 703.942.6610	Y	148	148	4/14/2023	TBD	N
9	Oxford School Residences Fairhaven, MA	Oxford School Residences LP 978.535.5600	Y	52	45	6/13/2022	4/3/2023	N
10	One University Family Fairfax, VA	One University Family, LLC 703.942.6610	Y	120	120	TBD	TBD	N
11	One University Senior Fairfax, VA	One University Senior, LLC 703.942.6610	Y	120	120	TBD	TBD	N
12	Parkside at Butler Mauldin, SC	Parkside at Butler, LP 703.942.6610	Y	72	72	2/15/2023	TBD	N
13	Frederick Road Senior Housing Gaithersburg, MD	Frederick Road Senior 4% Owner LLC 703.942.6610	Y	111	111	TBD	TBD	N
14	South Street Family Frederick, MD	South Street Family, LLC 703.942.6610	Y	56	56	TBD	TBD	N
15	South Street Senior Frederick, MD	South Street Senior, LLC 703.942.6610	Y	96	96	TBD	TBD	N
16	Helena Crocker Residences Westford, MA	Helena Crocker Residences LP 978.535.5600	Y	18	18	TBD	TBD	N
17	Parkside at Main Simpsonville, SC	Parkside at Main, LP 703.942.6610	Y	42	42	2/17/2021	2/24/2021	N
18	Parkside at Hudson Gastonia, NC	Parkside at Hudson, LP 703.942.6610	Y	80	80	11/6/2020	9/15/2021	N
19	Dogwood Trail Albany, GA	Dogwood Trail Apartments, LP 703.942.6610	Y	64	61	12/31/2020	2/25/2022	N
20	Springhill Apartments Madison, FL	Springhill Apartments, LLC 703.942.6610	Y	76	76	12/20/2019	8/19/2022	N

\* Must have the ability to bind the LIHTC entity; document with partnership/operating agreements and one 8609 (per entity/development) for a total of 6.

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TOTAL: 1,630 1,606

LIHTC as % of  
99% Total Units

ADD ADDITIONAL PROPERTIES USING NEXT TAB

Previous Participation Certification continued

	Development Name/Location	Name of Ownership Entity and Phone Number	Controlling General Partner? (Y/N)	Total Units	Low Income Units	Placed in Service Date	8609 Date	Non-compliance Found? Y/N (Explain Yes)
21	Parkside at Drayton Spartanburg, SC	Parkside at Drayton, LP 703.942.6610	Y	41	41	4/1/2019	1/27/2020	N
22	Perrytown Apartments Perry, FL	Perrytown Apartments, LL 703.942.6610	Y	100	100	5/21/2018	12/22/2020	N
23	Momentum at Shady Grove Derwood, MD	Momentum Apartments, 703.942.6610	Y	110	110	10/18/2019	2/9/2021	N
24	Douglass Village Douglassville, GA	Douglass Village Apartm 703.942.6610	Y	88	88	12/20/2018	8/26/2021	N
25	Hand Trading Company Apartments Pelham, GA	Hand TC Restoration, LP 703.942.6610	Y	54	44	12/16/2019	2/2/2021	N
26	The Forge on Broadway Buffalo, NY	SAAKC Buffalo Forge, LLC 978.535.5600	Y	158	141	7/31/2020	1/28/2022	N
27	Castle Creek Aspen, CO	488 Castle Creek, LLC 703.942.6610	Y	24	24	3/20/2018	7/16/2019	N
28	Ashton Cove Kingsland, GA	Kingsland Cove, LP 703.942.6610	Y	72	72	9/27/2018	6/17/2019	N
29	St James Terrace Baltimore, MD	St. James Apartments LP 703.942.6610	Y	151	151	7/20/2018	3/13/2019	N
30	Chelmsford Wood Residences II Chelmsford, MA	Chelmsford Woods Resid 978.535.5600	Y	58	58	7/6/2018	3/19/2019	N
31	Parkside at Bethel Clover, SC	Parkside at Bethel LP 703.942.6610	Y	42	42	5/11/2018	2/25/2019	N
32	Market Station Thomasville, GA	Market Station Apartmen 703.942.6610	Y	80	80	3/31/2018	10/3/2018	N
33	Coady School Residences Bourne, MA	Coady School Residence 978.535.5600	Y	58	58	8/25/2017	5/8/2018	N
34	Page Woodson Oklahoma City, OK	Page Woodson Develop 703.942.6610	Y	128	128	7/14/2017	11/26/2018	N
35	Park Heights Baltimore, MD	New Park Heights LLC 703.942.6610	Y	100	100	6/30/2017	4/17/2018	N
36	Residences at Government Center I Fairfax, VA	Fairfax Corner Partners LL 703.942.6610	Y	150	15	2/28/2017	9/27/2017	N
37	Residences at Government Center II Fairfax, VA	Fairfax Corner Partners II 703.942.6610	Y	120	120	2/28/2017	10/19/2017	N
38	Southfork Camilla, GA	Southfork Apartments LP 703.942.6610	Y	96	96	8/25/2016	3/14/2017	N
39	Parkside at Boulevard Orangeburg, SC	Parkside at Boulevard LP 703.942.6610	Y	44	44	7/29/2016	1/27/2017	N
40	Cypress Parc New Orleans, LA	FBT Community Develop 703.942.6610	Y	62	62	5/31/2016	3/10/2017	N
41	Chelmsford Woods Residences Chelmsford, MA	Chelmsford Woods Resid 978.535.5300	Y	58	58	2/26/2016	10/5/2016	N
42	Eureka Heights Ashburn GA	Eureka Heights, LP 703.942.6610	Y	56	56	6/30/2015	3/3/2016	N
43	Tangi Village Hammond, LA	Quick Blvd. Apartments L 703.942.6610	Y	61	61	11/30/2014	11/6/2015	N
44	Simpkins School Yarmouth, MA	Simpkins School Residenc 978.535.5600	Y	65	58	9/29/2014	5/18/2015	N
45	Ashley House Valdosta, GA	Ashley House Apartments 703.942.6610	Y	61	61	8/1/2014	6/2/2015	N
46	Elm Drive Senior Apartments Baton Rouge, LA	Elm Drive Senior Apartme 703.942.6610	Y	60	60	5/1/2014	11/6/2015	N
47	The Reserve at Sugar Mill St. Marys, GA	Ashton Pines Apartments, 703.942.6610	Y	70	70	10/26/2012	10/17/2013	N
48	Griffin Heights Tallahassee, FL	New Griffin Apartments, L 703.942.6610	Y	100	100	22/23/2012	1/11/2013	N
49	Pine Meadow Gainesville, FL	Pine Meadow Redevelop 703.942.6610	Y	78	78	12/7/2011	6/14/2013	N
50	Sand Dunes Panama City Beach, FL	Sand Dunes Redevelopm 703.942.6610	Y	104	104	12/7/2011	6/14/2013	N
51	Cypress Place Marrero, LA	1500 Westwood, LP 703.942.6610	Y	132	132	11/7/2011	11/8/2013	N
52	Three Tree Flats Washington, DC	3910 Georgia Avenue As 703.942.6610	Y	130	119	2/25/2011	1/24/2012	N
53	Lakeside Columbia, SC	New Lakeside Apartment 703.942.6610	Y	110	109	12/2/2010	2/24/2011	N
54	School Street Residences Athol, MA	School Street Residences 978.535.5600	Y	50	50	12/1/2010	12/30/2011	N
55	Fulton School Weymouth, MA	Fulton School Residences 978.535.5600	Y	63	63	11/2/2009	12/31/2010	N
56	Appian Way North Charleston, SC	8465 Patriot Boulevard, L 703.942.6610	N	204	204	6/1/2009	6/12/2009	N

2nd PAGE TOTAL: 3,138 2,957

GRAND TOTAL: 4,768 4,563

LIHTC as % of  
96% Total Unit

# List of LIHTC Developments (Schedule A)



Development Name: Somos Phase B

Name of Applicant: Somos Phase B, LLC

## INSTRUCTIONS:

- 1 A Schedule A is required for every individual that makes up the GP or Managing Member - does not apply to principals of publicly traded corporations.
- 2 For each property for which an uncorrected 8823 has been issued, provide a detailed explanation of the nature of the non-compliance, as well as a status statement.
- 3 List only tax credit development experience since 2007 (i.e. for the past 15 years)
- 4 Use separate pages as needed, for each principal.

Principal's Name: NJ Enterprises, LP Controlling GP (CGP) or 'Named' Managing Member of Proposed property? Y or N

	Development Name/Location	Name of Ownership Entity and Phone Number	CGP or 'Named' Managing Member at the time of dev.? (Y/N)*	Total Dev. Units	Total Low Income Units	Placed in Service Date	8609(s) Issue Date	Uncorrected 8823's? (Y/N) Explain "Y"
1	Coyle School Residences, LP	Coyle School Residences	Y	50	45	TBD	TBD	N
	Taunton, MA	703.942.6610						
2	Ovata at Reedy Creek, LP	Ovata at Reedy Creek, LP	Y	78	78	TBD	TBD	N
	Charlotte, NC	703.942.6610						
3	500 Northside Station	Partans, LLC	Y	90	81	7/30/2021	9/1/2022	N
	Spartanburg, SC	703.942.6610						
4	Renaissance Place	Renaissance Place, LP	Y	57	57	10/11/2019	3/4/2022	N
	Greenville, SC	703.942.6610						
5	Silver Creek	Knowles Manor Senior Housing LLC	Y	94	94	12/28/2021	7/31/2023	N
	Kensington, MD	703.942.6610						
6	Parkside at Hickory Grove	Parkside at Hickory Grove, LP	Y	80	80	10/1/2021	12/15/2022	N
	Charlotte, NC	703.942.6610						
7	Ovation at Arrowbrook I	Arrowbrook Apartments I, LLC	Y	126	126	3/30/2023	TBD	N
	Herndon, VA	703.942.6610						
8	Ovation at Arrowbrook II	Arrowbrook Apts II, LLC	Y	148	148	4/14/2023	TBD	N
	Herndon, VA	703.942.6610						
9	Oxford School Residences	Oxford School Residences LP	Y	52	45	6/13/2022	4/3/2023	N
	Fairhaven, MA	978.535.5600						
10	One University Family	One University Family, LLC	Y	120	120	TBD	TBD	N
	Fairfax, VA	703.942.6610						
11	One University Senior	One University Senior, LLC	Y	120	120	TBD	TBD	N
	Fairfax, VA	703.942.6610						
12	Parkside at Butler	Parkside at Butler, LP	Y	72	72	2/15/2023	TBD	N
	Mauldin, SC	703.942.6610						
13	Frederick Road Senior Housing	Frederick Road Senior 4% Owner LLC	Y	111	111	TBD	TBD	N
	Gaithersburg, MD	703.942.6610						
14	South Street Family	South Street Family, LLC	Y	56	56	TBD	TBD	N
	Frederick, MD	703.942.6610						
15	South Street Senior	South Street Senior, LLC	Y	96	96	TBD	TBD	N
	Frederick, MD	703.942.6610						
16	Helena Crocker Residences	Helena Crocker Residences LP	Y	18	18	TBD	TBD	N
	Westford, MA	978.535.5600						
17	Parkside at Main	Parkside at Main, LP	Y	42	42	2/17/2021	2/24/2021	N
	Simpsonville, SC	703.942.6610						
18	Parkside at Hudson	Parkside at Hudson, LP	Y	80	80	11/6/2020	9/15/2021	N
	Gastonia, NC	703.942.6610						
19	Dogwood Trail	Dogwood Trail Apartments, LP	Y	64	61	12/31/2020	2/25/2022	N
	Albany, GA	703.942.6610						
20	Springhill Apartments	Springhill Apartments, LLC	Y	76	76	12/20/2019	8/19/2022	N
	Madison, FL	703.942.6610						

\* Must have the ability to bind the LIHTC entity; document with partnership/operating agreements and one 8609 (per entity/development) for a total of 6.

1st PAGE

TOTAL: 1,630 1,606

LIHTC as % of

99% Total Units

ADD ADDITIONAL PROPERTIES USING NEXT TAB

Previous Participation Certification continued

	Development Name/Location	Name of Ownership Entity and Phone Number	Controlling General Partner? (Y/N)	Total Units	Low Income Units	Placed in Service Date	8609 Date	Non-compliance Found? Y/N (Explain Yes)
21	Parkside at Drayton Spartanburg, SC	Parkside at Drayton, LP 703.942.6610	Y	41	41	4/1/2019	1/27/2020	N
22	Perrytown Apartments Perry, FL	Perrytown Apartments, LL 703.942.6610	Y	100	100	5/21/2018	12/22/2020	N
23	Momentum at Shady Grove Derwood, MD	Momentum Apartments, 703.942.6610	Y	110	110	10/18/2019	2/9/2021	N
24	Doulass Village Doulassville, GA	Doulass Village Apartm 703.942.6610	Y	88	88	12/20/2018	8/26/2021	N
25	Hand Trading Company Apartments Pelham, GA	Hand TC Restoration, LP 703.942.6610	Y	54	44	12/16/2019	2/2/2021	N
26	The Forge on Broadway Buffalo, NY	SAAC Buffalo Forge, LLC 978.535.5600	Y	158	141	7/31/2020	1/28/2022	N
27	Castle Creek Aspen, CO	488 Castle Creek, LLC 703.942.6610	Y	24	24	3/20/2018	7/16/2019	N
28	Ashton Cove Kingsland, GA	Kingsland Cove, LP 703.942.6610	Y	72	72	9/27/2018	6/17/2019	N
29	St James Terrace Baltimore, MD	St. James Apartments LP 703.942.6610	Y	151	151	7/20/2018	3/13/2019	N
30	Chelmsford Wood Residences II Chelmsford, MA	Chelmsford Woods Resid 978.535.5600	Y	58	58	7/6/2018	3/19/2019	N
31	Parkside at Bethel Clover, SC	Parkside at Bethel LP 703.942.6610	Y	42	42	5/11/2018	2/25/2019	N
32	Market Station Thomasville, GA	Market Station Apartmen 703.942.6610	Y	80	80	3/31/2018	10/3/2018	N
33	Coady School Residences Bourne, MA	Coady School Residence 978.535.5600	Y	58	58	8/25/2017	5/8/2018	N
34	Page Woodson Oklahoma City, OK	Page Woodson Develop 703.942.6610	Y	128	128	7/14/2017	11/26/2018	N
35	Park Heights Baltimore, MD	New Park Heights LLC 703.942.6610	Y	100	100	6/30/2017	4/17/2018	N
36	Residences at Government Center I Fairfax, VA	Fairfax Corner Partners LL 703.942.6610	Y	150	15	2/28/2017	9/27/2017	N
37	Residences at Government Center II Fairfax, VA	Fairfax Corner Partners II 703.942.6610	Y	120	120	2/28/2017	10/19/2017	N
38	Southfork Camilla, GA	Southfork Apartments LP 703.942.6610	Y	96	96	8/25/2016	3/14/2017	N
39	Parkside at Boulevard Orangeburg, SC	Parkside at Boulevard LP 703.942.6610	Y	44	44	7/29/2016	1/27/2017	N
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41	Chelmsford Woods Residences Chelmsford, MA	Chelmsford Woods Resid 978.535.5300	Y	58	58	2/26/2016	10/5/2016	N
42	Eureka Heights Ashburn, GA	Eureka Heights, LP 703.942.6610	Y	56	56	6/30/2015	3/3/2016	N
43	Tangi Village Hammond, LA	Quick Blvd. Apartments L 703.942.6610	Y	61	61	11/30/2014	11/6/2015	N
44	Simpkins School Yarmouth, MA	Simpkins School Residenc 978.535.5600	Y	65	58	9/29/2014	5/18/2015	N
45	Ashley House Valdosta, GA	Ashley House Apartments 703.942.6610	Y	61	61	8/1/2014	6/2/2015	N
46	Elm Drive Senior Apartments Baton Rouge, LA	Elm Drive Senior Apartme 703.942.6610	Y	60	60	5/1/2014	11/6/2015	N
47	The Reserve at Sugar Mill St. Marys, GA	Ashton Pines Apartments, 703.942.6610	Y	70	70	10/26/2012	10/17/2013	N
48	Griffin Heights Tallahassee, FL	New Griffin Apartments, L 703.942.6610	Y	100	100	22/23/2012	1/11/2013	N
49	Pine Meadow Gainesville, FL	Pine Meadow Redevelop 703.942.6610	Y	78	78	12/7/2011	6/14/2013	N
50	Sand Dunes Panama City Beach, FL	Sand Dunes Redevelopm 703.942.6610	Y	104	104	12/7/2011	6/14/2013	N
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53	Lakeside Columbia, SC	New Lakeside Apartment 703.942.6610	Y	110	109	12/2/2010	2/24/2011	N
54	School Street Residences Athol, MA	School Street Residences 978.535.5600	Y	50	50	12/1/2010	12/30/2011	N
55	Fulton School Weymouth, MA	Fulton School Residences 978.535.5600	Y	63	63	11/2/2009	12/31/2010	N
56	Appian Way North Charleston, SC	8465 Patriot Boulevard, L 703.942.6610	N	204	204	6/1/2009	6/12/2009	N

2nd PAGE TOTAL: 3,138 2,957

GRAND TOTAL: 4,768 4,563

LIHTC as % of  
96% Total Unit

# List of LIHTC Developments (Schedule A)



Development Name: Somos Phase B

Name of Applicant: Somos Phase B, LLC

## INSTRUCTIONS:

- 1 A Schedule A is required for every individual that makes up the GP or Managing Member - does not apply to principals of publicly traded corporations.
- 2 For each property for which an uncorrected 8823 has been issued, provide a detailed explanation of the nature of the non-compliance, as well as a status statement.
- 3 List only tax credit development experience since 2007 (i.e. for the past 15 years)
- 4 Use separate pages as needed, for each principal.

Principal's Name: Stephen P. Wilson Controlling GP (CGP) or 'Named' Managing Member of Proposed property? Y  
Y or N

	Development Name/Location	Name of Ownership Entity and Phone Number	CGP or 'Named' Managing Member at the time of dev.? (Y/N)*	Total Dev. Units	Total Low Income Units	Placed in Service Date	8609(s) Issue Date	Uncorrected 8823's? (Y/N) Explain "Y"
1	Coyle School Residences, LP Taunton, MA	Coyle School Residences 703.942.6610	Y	50	45	TBD	TBD	N
2	Ovata at Reedy Creek, LP Charlotte, NC	Ovata at Reedy Creek, LP 703.942.6610	Y	78	78	TBD	TBD	N
3	500 Northside Station Spartanburg, SC	Partans, LLC 703.942.6610	Y	90	81	7/30/2021	9/1/2022	N
4	Renaissance Place Greenville, SC	Renaissance Place, LP 703.942.6610	Y	57	57	10/11/2019	3/4/2022	N
5	Silver Creek Kensington, MD	Knowles Manor Senior Housing LLC 703.942.6610	Y	94	94	12/28/2021	7/31/2023	N
6	Parkside at Hickory Grove Charlotte, NC	Parkside at Hickory Grove, LP 703.942.6610	Y	80	80	10/1/2021	12/15/2022	N
7	Ovation at Arrowbrook I Herndon, VA	Arrowbrook Apartments I, LLC 703.942.6610	Y	126	126	3/30/2023	TBD	N
8	Ovation at Arrowbrook II Herndon, VA	Arrowbrook Apts II, LLC 703.942.6610	Y	148	148	4/14/2023	TBD	N
9	Oxford School Residences Fairhaven, MA	Oxford School Residences LP 978.535.5600	Y	52	45	6/13/2022	4/3/2023	N
10	One University Family Fairfax, VA	One University Family, LLC 703.942.6610	Y	120	120	TBD	TBD	N
11	One University Senior Fairfax, VA	One University Senior, LLC 703.942.6610	Y	120	120	TBD	TBD	N
12	Parkside at Butler Mauldin, SC	Parkside at Butler, LP 703.942.6610	Y	72	72	2/15/2023	TBD	N
13	Frederick Road Senior Housing Gaithersburg, MD	Frederick Road Senior 4% Owner LLC 703.942.6610	Y	111	111	TBD	TBD	N
14	South Street Family Frederick, MD	South Street Family, LLC 703.942.6610	Y	56	56	TBD	TBD	N
15	South Street Senior Frederick, MD	South Street Senior, LLC 703.942.6610	Y	96	96	TBD	TBD	N
16	Helena Crocker Residences Westford, MA	Helena Crocker Residences LP 978.535.5600	Y	18	18	TBD	TBD	N
17	Parkside at Main Simpsonville, SC	Parkside at Main, LP 703.942.6610	Y	42	42	2/17/2021	2/24/2021	N
18	Parkside at Hudson Gastonia, NC	Parkside at Hudson, LP 703.942.6610	Y	80	80	11/6/2020	9/15/2021	N
19	Dogwood Trail Albany, GA	Dogwood Trail Apartments, LP 703.942.6610	Y	64	61	12/31/2020	2/25/2022	N
20	Springhill Apartments Madison, FL	Springhill Apartments, LLC 703.942.6610	Y	76	76	12/20/2019	8/19/2022	N

\* Must have the ability to bind the LIHTC entity; document with partnership/operating agreements and one 8609 (per entity/development) for a total of 6.

1st PAGE

TOTAL: 1,630 1,606

LIHTC as % of  
99% Total Units

ADD ADDITIONAL PROPERTIES USING NEXT TAB



Previous Participation Certification continued

	Development Name/Location	Name of Ownership Entity and Phone Number	Controlling General Partner? (Y/N)	Total Units	Low Income Units	Placed in Service Date	8609 Date	Non-compliance Found? Y/N (Explain Yes)
21	Parkside at Drayton Spartanburg, SC	Parkside at Drayton, LP 703.942.6610	Y	41	41	4/1/2019	1/27/2020	N
22	Perrytown Apartments Perry, FL	Perrytown Apartments, LLC 703.942.6610	Y	100	100	5/21/2018	12/22/2020	N
23	Momentum at Shady Grove Derwood, MD	Momentum Apartments, 703.942.6610	Y	110	110	10/18/2019	2/9/2021	N
24	Douglass Village Douglassville, GA	Douglass Village Apartm 703.942.6610	Y	88	88	12/20/2018	8/26/2021	N
25	Hand Trading Company Apartments Pelham, GA	Hand TC Restoration, LP 703.942.6610	Y	54	44	12/16/2019	2/2/2021	N
26	The Forge on Broadway Buffalo, NY	SAAKC Buffalo Forge, LLC 978.535.5600	Y	158	141	7/31/2020	1/28/2022	N
27	Castle Creek Aspen, CO	488 Castle Creek, LLC 703.942.6610	Y	24	24	3/20/2018	7/16/2019	N
28	Ashton Cove Kingsland, GA	Kingsland Cove, LP 703.942.6610	Y	72	72	9/27/2018	6/17/2019	N
29	St James Terrace Baltimore, MD	St. James Apartments LP 703.942.6610	Y	151	151	7/20/2018	3/13/2019	N
30	Chelmsford Wood Residences II Chelmsford, MA	Chelmsford Woods Resid 978.535.5600	Y	58	58	7/6/2018	3/19/2019	N
31	Parkside at Bethel Clover, SC	Parkside at Bethel LP 703.942.6610	Y	42	42	5/11/2018	2/25/2019	N
32	Market Station Thomasville, GA	Market Station Apartmen 703.942.6610	Y	80	80	3/31/2018	10/3/2018	N
33	Coady School Residences Bourne, MA	Coady School Residence 978.535.5600	Y	58	58	8/25/2017	5/8/2018	N
34	Page Woodson Oklahoma City, OK	Page Woodson Develop 703.942.6610	Y	128	128	7/14/2017	11/26/2018	N
35	Park Heights Baltimore, MD	New Park Heights LLC 703.942.6610	Y	100	100	6/30/2017	4/17/2018	N
36	Residences at Government Center I Fairfax, VA	Fairfax Corner Partners LL 703.942.6610	Y	150	15	2/28/2017	9/27/2017	N
37	Residences at Government Center II Fairfax, VA	Fairfax Corner Partners II L 703.942.6610	Y	120	120	2/28/2017	10/19/2017	N
38	Southfork Camilla, GA	Southfork Apartments LP 703.942.6610	Y	96	96	8/25/2016	3/14/2017	N
39	Parkside at Boulevard Orangeburg, SC	Parkside at Boulevard LP 703.942.6610	Y	44	44	7/29/2016	1/27/2017	N
40	Cypress Parc New Orleans, LA	FBT Community Develop 703.942.6610	Y	62	62	5/31/2016	3/10/2017	N
41	Chelmsford Woods Residences Chelmsford, MA	Chelmsford Woods Resid 978.535.5300	Y	58	58	2/26/2016	10/5/2016	N
42	Eureka Heights Ashburn GA	Eureka Heights, LP 703.942.6610	Y	56	56	6/30/2015	3/3/2016	N
43	Tangi Village Hammond, LA	Quick Blvd. Apartments L 703.942.6610	Y	61	61	11/30/2014	11/6/2015	N
44	Simpkins School Yarmouth, MA	Simpkins School Residenc 978.535.5600	Y	65	58	9/29/2014	5/18/2015	N
45	Ashley House Valdosta, GA	Ashley House Apartments 703.942.6610	Y	61	61	8/1/2014	6/2/2015	N
46	Elm Drive Senior Apartments Baton Rouge, LA	Elm Drive Senior Apartme 703.942.6610	Y	60	60	5/1/2014	11/6/2015	N
47	The Reserve at Sugar Mill St. Marys, GA	Ashton Pines Apartments, 703.942.6610	Y	70	70	10/26/2012	10/17/2013	N
48	Griffin Heights Tallahassee, FL	New Griffin Apartments, L 703.942.6610	Y	100	100	22/23/2012	1/11/2013	N
49	Pine Meadow Gainesville, FL	Pine Meadow Redevelop 703.942.6610	Y	78	78	12/7/2011	6/14/2013	N
50	Sand Dunes Panama City Beach, FL	Sand Dunes Redevelopm 703.942.6610	Y	104	104	12/7/2011	6/14/2013	N
51	Cypress Place Marrero, LA	1500 Westwood, LP 703.942.6610	Y	132	132	11/7/2011	11/8/2013	N
52	Three Tree Flats Washington, DC	3910 Georgia Avenue As 703.942.6610	Y	130	119	2/25/2011	1/24/2012	N
53	Lakeside Columbia, SC	New Lakeside Apartment 703.942.6610	Y	110	109	12/2/2010	2/24/2011	N
54	School Street Residences Athol, MA	School Street Residences 978.535.5600	Y	50	50	12/1/2010	12/30/2011	N
55	Fulton School Weymouth, MA	Fulton School Residences 978.535.5600	Y	63	63	11/2/2009	12/31/2010	N
56	Appian Way North Charleston, SC	8465 Patriot Boulevard, L 703.942.6610	N	204	204	6/1/2009	6/12/2009	N

2nd PAGE TOTAL: 3,138 2,957

GRAND TOTAL: 4,768 4,563

LIHTC as % of  
96% Total Unit



# List of LIHTC Developments (Schedule A)



Development Name: Somos Phase B

Name of Applicant: Somos Phase B, LLC

## INSTRUCTIONS:

- 1 A Schedule A is required for every individual that makes up the GP or Managing Member - does not apply to principals of publicly traded corporations.
- 2 For each property for which an uncorrected 8823 has been issued, provide a detailed explanation of the nature of the non-compliance, as well as a status statement.
- 3 List only tax credit development experience since 2007 (i.e. for the past 15 years)
- 4 Use separate pages as needed, for each principal.

Principal's Name: Kyle F. Wolff Controlling GP (CGP) or 'Named' Managing Member of Proposed property? Y  
Y or N

	Development Name/Location	Name of Ownership Entity and Phone Number	CGP or 'Named' Managing Member at the time of dev.? (Y/N)*	Total Dev. Units	Total Low Income Units	Placed in Service Date	8609(s) Issue Date	Uncorrected 8823's? (Y/N) Explain "Y"
1	Coyle School Residences, LP Taunton, MA	Coyle School Residences 703.942.6610	Y	50	45	TBD	TBD	N
2	Ovata at Reedy Creek, LP Charlotte, NC	Ovata at Reedy Creek, LP 703.942.6610	Y	78	78	TBD	TBD	N
3	500 Northside Station Spartanburg, SC	Partans, LLC 703.942.6610	Y	90	81	7/30/2021	9/1/2022	N
4	Renaissance Place Greenville, SC	Renaissance Place, LP 703.942.6610	Y	57	57	10/11/2019	3/4/2022	N
5	Silver Creek Kensington, MD	Knowles Manor Senior Housing LLC 703.942.6610	Y	94	94	12/28/2021	7/31/2023	N
6	Parkside at Hickory Grove Charlotte, NC	Parkside at Hickory Grove, LP 703.942.6610	Y	80	80	10/1/2021	12/15/2022	N
7	Ovation at Arrowbrook I Herndon, VA	Arrowbrook Apartments I, LLC 703.942.6610	Y	126	126	3/30/2023	TBD	N
8	Ovation at Arrowbrook II Herndon, VA	Arrowbrook Apts II, LLC 703.942.6610	Y	148	148	4/14/2023	TBD	N
9	Oxford School Residences Fairhaven, MA	Oxford School Residences LP 978.535.5600	Y	52	45	6/13/2022	4/3/2023	N
10	One University Family Fairfax, VA	One University Family, LLC 703.942.6610	Y	120	120	TBD	TBD	N
11	One University Senior Fairfax, VA	One University Senior, LLC 703.942.6610	Y	120	120	TBD	TBD	N
12	Parkside at Butler Mauldin, SC	Parkside at Butler, LP 703.942.6610	Y	72	72	2/15/2023	TBD	N
13	Frederick Road Senior Housing Gaithersburg, MD	Frederick Road Senior 4% Owner LLC 703.942.6610	Y	111	111	TBD	TBD	N
14	South Street Family Frederick, MD	South Street Family, LLC 703.942.6610	Y	56	56	TBD	TBD	N
15	South Street Senior Frederick, MD	South Street Senior, LLC 703.942.6610	Y	96	96	TBD	TBD	N
16	Helena Crocker Residences Westford, MA	Helena Crocker Residences LP 978.535.5600	Y	18	18	TBD	TBD	N
17	Parkside at Main Simpsonville, SC	Parkside at Main, LP 703.942.6610	Y	42	42	2/17/2021	2/24/2021	N
18	Parkside at Hudson Gastonia, NC	Parkside at Hudson, LP 703.942.6610	Y	80	80	11/6/2020	9/15/2021	N
19	Dogwood Trail Albany, GA	Dogwood Trail Apartments, LP 703.942.6610	Y	64	61	12/31/2020	2/25/2022	N
20	Springhill Apartments Madison, FL	Springhill Apartments, LLC 703.942.6610	Y	76	76	12/20/2019	8/19/2022	N

\* Must have the ability to bind the LIHTC entity; document with partnership/operating agreements and one 8609 (per entity/development) for a total of 6.

1st PAGE

TOTAL: 1,630 1,606

LIHTC as % of  
99% Total Units

ADD ADDITIONAL PROPERTIES USING NEXT TAB

Previous Participation Certification continued

	Development Name/Location	Name of Ownership Entity and Phone Number	Controlling General Partner? (Y/N)	Total Units	Low Income Units	Placed in Service Date	8609 Date	Non-compliance Found? Y/N (Explain Yes)
21	Parkside at Drayton Spartanburg, SC	Parkside at Drayton, LP 703.942.6610	Y	41	41	4/1/2019	1/27/2020	N
22	Perrytown Apartments Perry, FL	Perrytown Apartments, LLC 703.942.6610	Y	100	100	5/21/2018	12/22/2020	N
23	Momentum at Shady Grove Derwood, MD	Momentum Apartments, 703.942.6610	Y	110	110	10/18/2019	2/9/2021	N
24	Douglass Village Douglassville, GA	Douglass Village Apartm 703.942.6610	Y	88	88	12/20/2018	8/26/2021	N
25	Hand Trading Company Apartments Pelham, GA	Hand TC Restoration, LP 703.942.6610	Y	54	44	12/16/2019	2/2/2021	N
26	The Forge on Broadway Buffalo, NY	SAAKC Buffalo Forge, LLC 978.535.5600	Y	158	141	7/31/2020	1/28/2022	N
27	Castle Creek Aspen, CO	488 Castle Creek, LLC 703.942.6610	Y	24	24	3/20/2018	7/16/2019	N
28	Ashton Cove Kingsland, GA	Kingsland Cove, LP 703.942.6610	Y	72	72	9/27/2018	6/17/2019	N
29	St James Terrace Baltimore, MD	St. James Apartments LP 703.942.6610	Y	151	151	7/20/2018	3/13/2019	N
30	Chelmsford Wood Residences II Chelmsford, MA	Chelmsford Woods Resid 978.535.5600	Y	58	58	7/6/2018	3/19/2019	N
31	Parkside at Bethel Clover, SC	Parkside at Bethel LP 703.942.6610	Y	42	42	5/11/2018	2/25/2019	N
32	Market Station Thomasville, GA	Market Station Apartmen 703.942.6610	Y	80	80	3/31/2018	10/3/2018	N
33	Coady School Residences Bourne, MA	Coady School Residence 978.535.5600	Y	58	58	8/25/2017	5/8/2018	N
34	Page Woodson Oklahoma City, OK	Page Woodson Develop 703.942.6610	Y	128	128	7/14/2017	11/26/2018	N
35	Park Heights Baltimore, MD	New Park Heights LLC 703.942.6610	Y	100	100	6/30/2017	4/17/2018	N
36	Residences at Government Center I Fairfax, VA	Fairfax Corner Partners LL 703.942.6610	Y	150	15	2/28/2017	9/27/2017	N
37	Residences at Government Center II Fairfax, VA	Fairfax Corner Partners II L 703.942.6610	Y	120	120	2/28/2017	10/19/2017	N
38	Southfork Camilla, GA	Southfork Apartments LP 703.942.6610	Y	96	96	8/25/2016	3/14/2017	N
39	Parkside at Boulevard Orangeburg, SC	Parkside at Boulevard LP 703.942.6610	Y	44	44	7/29/2016	1/27/2017	N
40	Cypress Parc New Orleans, LA	FBT Community Develop 703.942.6610	Y	62	62	5/31/2016	3/10/2017	N
41	Chelmsford Woods Residences Chelmsford, MA	Chelmsford Woods Resid 978.535.5300	Y	58	58	2/26/2016	10/5/2016	N
42	Eureka Heights Ashburn GA	Eureka Heights, LP 703.942.6610	Y	56	56	6/30/2015	3/3/2016	N
43	Tangi Village Hammond, LA	Quick Blvd. Apartments L 703.942.6610	Y	61	61	11/30/2014	11/6/2015	N
44	Simpkins School Yarmouth, MA	Simpkins School Residenc 978.535.5600	Y	65	58	9/29/2014	5/18/2015	N
45	Ashley House Valdosta, GA	Ashley House Apartments 703.942.6610	Y	61	61	8/1/2014	6/2/2015	N
46	Elm Drive Senior Apartments Baton Rouge, LA	Elm Drive Senior Apartme 703.942.6610	Y	60	60	5/1/2014	11/6/2015	N
47	The Reserve at Sugar Mill St. Marys, GA	Ashton Pines Apartments, 703.942.6610	Y	70	70	10/26/2012	10/17/2013	N
48	Griffin Heights Tallahassee, FL	New Griffin Apartments, L 703.942.6610	Y	100	100	22/23/2012	1/11/2013	N
49	Pine Meadow Gainesville, FL	Pine Meadow Redevelop 703.942.6610	Y	78	78	12/7/2011	6/14/2013	N
50	Sand Dunes Panama City Beach, FL	Sand Dunes Redevelopm 703.942.6610	Y	104	104	12/7/2011	6/14/2013	N
51	Cypress Place Marrero, LA	1500 Westwood, LP 703.942.6610	Y	132	132	11/7/2011	11/8/2013	N
52	Three Tree Flats Washington, DC	3910 Georgia Avenue As 703.942.6610	Y	130	119	2/25/2011	1/24/2012	N
53	Lakeside Columbia, SC	New Lakeside Apartment 703.942.6610	Y	110	109	12/2/2010	2/24/2011	N
54	School Street Residences Athol, MA	School Street Residences 978.535.5600	Y	50	50	12/1/2010	12/30/2011	N
55	Fulton School Weymouth, MA	Fulton School Residences 978.535.5600	Y	63	63	11/2/2009	12/31/2010	N
56	Appian Way North Charleston, SC	8465 Patriot Boulevard, L 703.942.6610	N	204	204	6/1/2009	6/12/2009	N

2nd PAGE TOTAL: 3,138 2,957

GRAND TOTAL: 4,768 4,563

LIHTC as % of  
96% Total Unit

# List of LIHTC Developments (Schedule A)



Development Name: Somos Phase B

Name of Applicant: Somos Phase B, LLC

## INSTRUCTIONS:

- 1 A Schedule A is required for every individual that makes up the GP or Managing Member - does not apply to principals of publicly traded corporations.
- 2 For each property for which an uncorrected 8823 has been issued, provide a detailed explanation of the nature of the non-compliance, as well as a status statement.
- 3 List only tax credit development experience since 2007 (i.e. for the past 15 years)
- 4 Use separate pages as needed, for each principal.

Principal's Name: Stratford Capital Group, LLC Controlling GP (CGP) or 'Named' Managing Member of Proposed property? Y  
Y or N

	Development Name/Location	Name of Ownership Entity and Phone Number	CGP or 'Named' Managing Member at the time of dev.? (Y/N)*	Total Dev. Units	Total Low Income Units	Placed in Service Date	8609(s) Issue Date	Uncorrected 8823's? (Y/N) Explain "Y"
1	Coyle School Residences, LP Taunton, MA	Coyle School Residences 703.942.6610	Y	50	45	TBD	TBD	N
2	Ovata at Reedy Creek, LP Charlotte, NC	Ovata at Reedy Creek, LP 703.942.6610	Y	78	78	TBD	TBD	N
3	500 Northside Station Spartanburg, SC	Partans, LLC 703.942.6610	Y	90	81	7/30/2021	9/1/2022	N
4	Renaissance Place Greenville, SC	Renaissance Place, LP 703.942.6610	Y	57	57	10/11/2019	3/4/2022	N
5	Silver Creek Kensington, MD	Knowles Manor Senior Housing LLC 703.942.6610	Y	94	94	12/28/2021	7/31/2023	N
6	Parkside at Hickory Grove Charlotte, NC	Parkside at Hickory Grove, LP 703.942.6610	Y	80	80	10/1/2021	12/15/2022	N
7	Ovation at Arrowbrook I Herndon, VA	Arrowbrook Apartments I, LLC 703.942.6610	Y	126	126	3/30/2023	TBD	N
8	Ovation at Arrowbrook II Herndon, VA	Arrowbrook Apts II, LLC 703.942.6610	Y	148	148	4/14/2023	TBD	N
9	Oxford School Residences Fairhaven, MA	Oxford School Residences LP 978.535.5600	Y	52	45	6/13/2022	4/3/2023	N
10	One University Family Fairfax, VA	One University Family, LLC 703.942.6610	Y	120	120	TBD	TBD	N
11	One University Senior Fairfax, VA	One University Senior, LLC 703.942.6610	Y	120	120	TBD	TBD	N
12	Parkside at Butler Mauldin, SC	Parkside at Butler, LP 703.942.6610	Y	72	72	2/15/2023	TBD	N
13	Frederick Road Senior Housing Gaithersburg, MD	Frederick Road Senior 4% Owner LLC 703.942.6610	Y	111	111	TBD	TBD	N
14	South Street Family Frederick, MD	South Street Family, LLC 703.942.6610	Y	56	56	TBD	TBD	N
15	South Street Senior Frederick, MD	South Street Senior, LLC 703.942.6610	Y	96	96	TBD	TBD	N
16	Helena Crocker Residences Westford, MA	Helena Crocker Residences LP 978.535.5600	Y	18	18	TBD	TBD	N
17	Parkside at Main Simpsonville, SC	Parkside at Main, LP 703.942.6610	Y	42	42	2/17/2021	2/24/2021	N
18	Parkside at Hudson Gastonia, NC	Parkside at Hudson, LP 703.942.6610	Y	80	80	11/6/2020	9/15/2021	N
19	Dogwood Trail Albany, GA	Dogwood Trail Apartments, LP 703.942.6610	Y	64	61	12/31/2020	2/25/2022	N
20	Springhill Apartments Madison, FL	Springhill Apartments, LLC 703.942.6610	Y	76	76	12/20/2019	8/19/2022	N

\* Must have the ability to bind the LIHTC entity; document with partnership/operating agreements and one 8609 (per entity/development) for a total of 6.

1st PAGE

TOTAL: 1,630 1,606

LIHTC as % of  
99% Total Units

ADD ADDITIONAL PROPERTIES USING NEXT TAB

Previous Participation Certification continued

	Development Name/Location	Name of Ownership Entity and Phone Number	Controlling General Partner? (Y/N)	Total Units	Low Income Units	Placed in Service Date	8609 Date	Non-compliance Found? Y/N (Explain Yes)
21	Parkside at Drayton Spartanburg, SC	Parkside at Drayton, LP 703.942.6610	Y	41	41	4/1/2019	1/27/2020	N
22	Perrytown Apartments Perry, FL	Perrytown Apartments, LL 703.942.6610	Y	100	100	5/21/2018	12/22/2020	N
23	Momentum at Shady Grove Derwood, MD	Momentum Apartments, 703.942.6610	Y	110	110	10/18/2019	2/9/2021	N
24	Douglass Village Douglassville, GA	Douglass Village Apartm 703.942.6610	Y	88	88	12/20/2018	8/26/2021	N
25	Hand Trading Company Apartments Pelham, GA	Hand TC Restoration, LP 703.942.6610	Y	54	44	12/16/2019	2/2/2021	N
26	The Forge on Broadway Buffalo, NY	SAAKC Buffalo Forge, LLC 978.535.5600	Y	158	141	7/31/2020	1/28/2022	N
27	Castle Creek Aspen, CO	488 Castle Creek, LLC 703.942.6610	Y	24	24	3/20/2018	7/16/2019	N
28	Ashton Cove Kingsland, GA	Kingsland Cove, LP 703.942.6610	Y	72	72	9/27/2018	6/17/2019	N
29	St James Terrace Baltimore, MD	St. James Apartments LP 703.942.6610	Y	151	151	7/20/2018	3/13/2019	N
30	Chelmsford Wood Residences II Chelmsford, MA	Chelmsford Woods Resid 978.535.5600	Y	58	58	7/6/2018	3/19/2019	N
31	Parkside at Bethel Clover, SC	Parkside at Bethel LP 703.942.6610	Y	42	42	5/11/2018	2/25/2019	N
32	Market Station Thomasville, GA	Market Station Apartmen 703.942.6610	Y	80	80	3/31/2018	10/3/2018	N
33	Coady School Residences Bourne, MA	Coady School Residence 978.535.5600	Y	58	58	8/25/2017	5/8/2018	N
34	Page Woodson Oklahoma City, OK	Page Woodson Develop 703.942.6610	Y	128	128	7/14/2017	11/26/2018	N
35	Park Heights Baltimore, MD	New Park Heights LLC 703.942.6610	Y	100	100	6/30/2017	4/17/2018	N
36	Residences at Government Center I Fairfax, VA	Fairfax Corner Partners LL 703.942.6610	Y	150	15	2/28/2017	9/27/2017	N
37	Residences at Government Center II Fairfax, VA	Fairfax Corner Partners II 703.942.6610	Y	120	120	2/28/2017	10/19/2017	N
38	Southfork Camilla, GA	Southfork Apartments LP 703.942.6610	Y	96	96	8/25/2016	3/14/2017	N
39	Parkside at Boulevard Orangeburg, SC	Parkside at Boulevard LP 703.942.6610	Y	44	44	7/29/2016	1/27/2017	N
40	Cypress Parc New Orleans, LA	FBT Community Develop 703.942.6610	Y	62	62	5/31/2016	3/10/2017	N
41	Chelmsford Woods Residences Chelmsford, MA	Chelmsford Woods Resid 978.535.5300	Y	58	58	2/26/2016	10/5/2016	N
42	Eureka Heights Ashburn GA	Eureka Heights, LP 703.942.6610	Y	56	56	6/30/2015	3/3/2016	N
43	Tangi Village Hammond, LA	Quick Blvd. Apartments L 703.942.6610	Y	61	61	11/30/2014	11/6/2015	N
44	Simpkins School Yarmouth, MA	Simpkins School Residenc 978.535.5600	Y	65	58	9/29/2014	5/18/2015	N
45	Ashley House Valdosta, GA	Ashley House Apartments 703.942.6610	Y	61	61	8/1/2014	6/2/2015	N
46	Elm Drive Senior Apartments Baton Rouge, LA	Elm Drive Senior Apartme 703.942.6610	Y	60	60	5/1/2014	11/6/2015	N
47	The Reserve at Sugar Mill St. Marys, GA	Ashton Pines Apartments, 703.942.6610	Y	70	70	10/26/2012	10/17/2013	N
48	Griffin Heights Tallahassee, FL	New Griffin Apartments, L 703.942.6610	Y	100	100	22/23/2012	1/11/2013	N
49	Pine Meadow Gainesville, FL	Pine Meadow Redevelop 703.942.6610	Y	78	78	12/7/2011	6/14/2013	N
50	Sand Dunes Panama City Beach, FL	Sand Dunes Redevelopm 703.942.6610	Y	104	104	12/7/2011	6/14/2013	N
51	Cypress Place Marrero, LA	1500 Westwood, LP 703.942.6610	Y	132	132	11/7/2011	11/8/2013	N
52	Three Tree Flats Washington, DC	3910 Georgia Avenue As 703.942.6610	Y	130	119	2/25/2011	1/24/2012	N
53	Lakeside Columbia, SC	New Lakeside Apartment 703.942.6610	Y	110	109	12/2/2010	2/24/2011	N
54	School Street Residences Athol, MA	School Street Residences 978.535.5600	Y	50	50	12/1/2010	12/30/2011	N
55	Fulton School Weymouth, MA	Fulton School Residences 978.535.5600	Y	63	63	11/2/2009	12/31/2010	N
56	Appian Way North Charleston, SC	8465 Patriot Boulevard, L 703.942.6610	N	204	204	6/1/2009	6/12/2009	N

2nd PAGE TOTAL: 3,138 2,957

GRAND TOTAL: 4,768 4,563

LIHTC as % of  
96% Total Unit

# List of LIHTC Developments (Schedule A)



Development Name: Somos Phase B

Name of Applicant: Somos Phase B, LLC

## INSTRUCTIONS:

- 1 A Schedule A is required for **every** individual that makes up the GP or Managing Member - does not apply to principals of publicly traded corporations.
- 2 For each property for which an uncorrected 8823 has been issued, provide a detailed explanation of the nature of the non-compliance, as well as a status statement.
- 3 List only tax credit development experience since 2007 (i.e. for the past 15 years)
- 4 Use separate pages as needed, for each principal.

Principal's Name: Doublewide, LLC Controlling GP (CGP) or 'Named' Managing Member of Proposed property? Y or N

	Development Name/Location	Name of Ownership Entity and Phone Number	CGP or 'Named' Managing Member at the time of dev.? (Y/N)*	Total Dev. Units	Total Low Income Units	Placed in Service Date	8609(s) Issue Date	Uncorrected 8823's? (Y/N) Explain "Y"
1	Coyle School Residences, LP Taunton, MA	Coyle School Residences 703.942.6610	Y	50	45	TBD	TBD	N
2	Ovata at Reedy Creek, LP Charlotte, NC	Ovata at Reedy Creek, LP 703.942.6610	Y	78	78	TBD	TBD	N
3	500 Northside Station Spartanburg, SC	Partans, LLC 703.942.6610	Y	90	81	7/30/2021	9/1/2022	N
4	Renaissance Place Greenville, SC	Renaissance Place, LP 703.942.6610	Y	57	57	10/11/2019	3/4/2022	N
5	Silver Creek Kensington, MD	Knowles Manor Senior Housing LLC 703.942.6610	Y	94	94	12/28/2021	7/31/2023	N
6	Parkside at Hickory Grove Charlotte, NC	Parkside at Hickory Grove, LP 703.942.6610	Y	80	80	10/1/2021	12/15/2022	N
7	Ovation at Arrowbrook I Herndon, VA	Arrowbrook Apartments I, LLC 703.942.6610	Y	126	126	3/30/2023	TBD	N
8	Ovation at Arrowbrook II Herndon, VA	Arrowbrook Apts II, LLC 703.942.6610	Y	148	148	4/14/2023	TBD	N
9	Oxford School Residences Fairhaven, MA	Oxford School Residences LP 978.535.5600	Y	52	45	6/13/2022	4/3/2023	N
10	One University Family Fairfax, VA	One University Family, LLC 703.942.6610	Y	120	120	TBD	TBD	N
11	One University Senior Fairfax, VA	One University Senior, LLC 703.942.6610	Y	120	120	TBD	TBD	N
12	Parkside at Butler Mauldin, SC	Parkside at Butler, LP 703.942.6610	Y	72	72	2/15/2023	TBD	N
13	Frederick Road Senior Housing Gaithersburg, MD	Frederick Road Senior 4% Owner LLC 703.942.6610	Y	111	111	TBD	TBD	N
14	South Street Family Frederick, MD	South Street Family, LLC 703.942.6610	Y	56	56	TBD	TBD	N
15	South Street Senior Frederick, MD	South Street Senior, LLC 703.942.6610	Y	96	96	TBD	TBD	N
16	Helena Crocker Residences Westford, MA	Helena Crocker Residences LP 978.535.5600	Y	18	18	TBD	TBD	N
17	Parkside at Main Simpsonville, SC	Parkside at Main, LP 703.942.6610	Y	42	42	2/17/2021	2/24/2021	N
18	Parkside at Hudson Gastonia, NC	Parkside at Hudson, LP 703.942.6610	Y	80	80	11/6/2020	9/15/2021	N
19	Dogwood Trail Albany, GA	Dogwood Trail Apartments, LP 703.942.6610	Y	64	61	12/31/2020	2/25/2022	N
20	Springhill Apartments Madison, FL	Springhill Apartments, LLC 703.942.6610	Y	76	76	12/20/2019	8/19/2022	N

\* Must have the ability to bind the LIHTC entity; document with partnership/operating agreements and one 8609 (per entity/development) for a total of 6.

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TOTAL: 1,630 1,606

LIHTC as % of  
99% Total Units

ADD ADDITIONAL PROPERTIES USING NEXT TAB

Previous Participation Certification continued

	Development Name/Location	Name of Ownership Entity and Phone Number	Controlling General Partner? (Y/N)	Total Units	Low Income Units	Placed in Service Date	8609 Date	Non-compliance Found? Y/N (Explain Yes)
21	Parkside at Drayton Spartanburg, SC	Parkside at Drayton, LP 703.942.6610	Y	41	41	4/1/2019	1/27/2020	N
22	Perrytown Apartments Perry, FL	Perrytown Apartments, LL 703.942.6610	Y	100	100	5/21/2018	12/22/2020	N
23	Momentum at Shady Grove Derwood, MD	Momentum Apartments, 703.942.6610	Y	110	110	10/18/2019	2/9/2021	N
24	Douglass Village Douglassville, GA	Douglass Village Apartm 703.942.6610	Y	88	88	12/20/2018	8/26/2021	N
25	Hand Trading Company Apartments Pelham, GA	Hand TC Restoration, LP 703.942.6610	Y	54	44	12/16/2019	2/2/2021	N
26	The Forge on Broadway Buffalo, NY	SAAKC Buffalo Forge, LLC 978.535.5600	Y	158	141	7/31/2020	1/28/2022	N
27	Castle Creek Aspen, CO	488 Castle Creek, LLC 703.942.6610	Y	24	24	3/20/2018	7/16/2019	N
28	Ashton Cove Kingsland, GA	Kingsland Cove, LP 703.942.6610	Y	72	72	9/27/2018	6/17/2019	N
29	St James Terrace Baltimore, MD	St. James Apartments LP 703.942.6610	Y	151	151	7/20/2018	3/13/2019	N
30	Chelmsford Wood Residences II Chelmsford, MA	Chelmsford Woods Resid 978.535.5600	Y	58	58	7/6/2018	3/19/2019	N
31	Parkside at Bethel Clover, SC	Parkside at Bethel LP 703.942.6610	Y	42	42	5/11/2018	2/25/2019	N
32	Market Station Thomasville, GA	Market Station Apartmen 703.942.6610	Y	80	80	3/31/2018	10/3/2018	N
33	Coady School Residences Bourne, MA	Coady School Residence 978.535.5600	Y	58	58	8/25/2017	5/8/2018	N
34	Page Woodson Oklahoma City, OK	Page Woodson Develop 703.942.6610	Y	128	128	7/14/2017	11/26/2018	N
35	Park Heights Baltimore, MD	New Park Heights LLC 703.942.6610	Y	100	100	6/30/2017	4/17/2018	N
36	Residences at Government Center I Fairfax, VA	Fairfax Corner Partners LL 703.942.6610	Y	150	15	2/28/2017	9/27/2017	N
37	Residences at Government Center II Fairfax, VA	Fairfax Corner Partners II 703.942.6610	Y	120	120	2/28/2017	10/19/2017	N
38	Southfork Camilla, GA	Southfork Apartments LP 703.942.6610	Y	96	96	8/25/2016	3/14/2017	N
39	Parkside at Boulevard Orangeburg, SC	Parkside at Boulevard LP 703.942.6610	Y	44	44	7/29/2016	1/27/2017	N
40	Cypress Parc New Orleans, LA	FBT Community Develop 703.942.6610	Y	62	62	5/31/2016	3/10/2017	N
41	Chelmsford Woods Residences Chelmsford, MA	Chelmsford Woods Resid 978.535.5300	Y	58	58	2/26/2016	10/5/2016	N
42	Eureka Heights Ashburn GA	Eureka Heights, LP 703.942.6610	Y	56	56	6/30/2015	3/3/2016	N
43	Tangi Village Hammond, LA	Quick Blvd. Apartments L 703.942.6610	Y	61	61	11/30/2014	11/6/2015	N
44	Simpkins School Yarmouth, MA	Simpkins School Residenc 978.535.5600	Y	65	58	9/29/2014	5/18/2015	N
45	Ashley House Valdosta, GA	Ashley House Apartments 703.942.6610	Y	61	61	8/1/2014	6/2/2015	N
46	Elm Drive Senior Apartments Baton Rouge, LA	Elm Drive Senior Apartme 703.942.6610	Y	60	60	5/1/2014	11/6/2015	N
47	The Reserve at Sugar Mill St. Marys, GA	Ashton Pines Apartments, 703.942.6610	Y	70	70	10/26/2012	10/17/2013	N
48	Griffin Heights Tallahassee, FL	New Griffin Apartments, L 703.942.6610	Y	100	100	22/23/2012	1/11/2013	N
49	Pine Meadow Gainesville, FL	Pine Meadow Redevelop 703.942.6610	Y	78	78	12/7/2011	6/14/2013	N
50	Sand Dunes Panama City Beach, FL	Sand Dunes Redevelopm 703.942.6610	Y	104	104	12/7/2011	6/14/2013	N
51	Cypress Place Marrero, LA	1500 Westwood, LP 703.942.6610	Y	132	132	11/7/2011	11/8/2013	N
52	Three Tree Flats Washington, DC	3910 Georgia Avenue As 703.942.6610	Y	130	119	2/25/2011	1/24/2012	N
53	Lakeside Columbia, SC	New Lakeside Apartment 703.942.6610	Y	110	109	12/2/2010	2/24/2011	N
54	School Street Residences Athol, MA	School Street Residences 978.535.5600	Y	50	50	12/1/2010	12/30/2011	N
55	Fulton School Weymouth, MA	Fulton School Residences 978.535.5600	Y	63	63	11/2/2009	12/31/2010	N
56	Appian Way North Charleston, SC	8465 Patriot Boulevard, L 703.942.6610	N	204	204	6/1/2009	6/12/2009	N

2nd PAGE TOTAL: 3,138 2,957

GRAND TOTAL: 4,768 4,563

LIHTC as % of  
96% Total Unit

# List of LIHTC Developments (Schedule A)



Development Name: Somos Phase B

Name of Applicant: Somos Phase B, LLC

## INSTRUCTIONS:

- 1 A Schedule A is required for **every** individual that makes up the GP or Managing Member - does not apply to principals of publicly traded corporations.
- 2 For each property for which an uncorrected 8823 has been issued, provide a detailed explanation of the nature of the non-compliance, as well as a status statement.
- 3 List only tax credit development experience since 2007 (i.e. for the past 15 years)
- 4 Use separate pages as needed, for each principal.

Principal's Name: Milo Investments, LLC Controlling GP (CGP) or 'Named' Managing Member of Proposed property? Y  
Y or N

	Development Name/Location	Name of Ownership Entity and Phone Number	CGP or 'Named' Managing Member at the time of dev.? (Y/N)*	Total Dev. Units	Total Low Income Units	Placed in Service Date	8609(s) Issue Date	Uncorrected 8823's? (Y/N) Explain "Y"
1	Coyle School Residences, LP Taunton, MA	Coyle School Residences 703.942.6610	Y	50	45	TBD	TBD	N
2	Ovata at Reedy Creek, LP Charlotte, NC	Ovata at Reedy Creek, LP 703.942.6610	Y	78	78	TBD	TBD	N
3	500 Northside Station Spartanburg, SC	Partans, LLC 703.942.6610	Y	90	81	7/30/2021	9/1/2022	N
4	Renaissance Place Greenville, SC	Renaissance Place, LP 703.942.6610	Y	57	57	10/11/2019	3/4/2022	N
5	Silver Creek Kensington, MD	Knowles Manor Senior Housing LLC 703.942.6610	Y	94	94	12/28/2021	7/31/2023	N
6	Parkside at Hickory Grove Charlotte, NC	Parkside at Hickory Grove, LP 703.942.6610	Y	80	80	10/1/2021	12/15/2022	N
7	Ovation at Arrowbrook I Herndon, VA	Arrowbrook Apartments I, LLC 703.942.6610	Y	126	126	3/30/2023	TBD	N
8	Ovation at Arrowbrook II Herndon, VA	Arrowbrook Apts II, LLC 703.942.6610	Y	148	148	4/14/2023	TBD	N
9	Oxford School Residences Fairhaven, MA	Oxford School Residences LP 978.535.5600	Y	52	45	6/13/2022	4/3/2023	N
10	One University Family Fairfax, VA	One University Family, LLC 703.942.6610	Y	120	120	TBD	TBD	N
11	One University Senior Fairfax, VA	One University Senior, LLC 703.942.6610	Y	120	120	TBD	TBD	N
12	Parkside at Butler Mauldin, SC	Parkside at Butler, LP 703.942.6610	Y	72	72	2/15/2023	TBD	N
13	Frederick Road Senior Housing Gaithersburg, MD	Frederick Road Senior 4% Owner LLC 703.942.6610	Y	111	111	TBD	TBD	N
14	South Street Family Frederick, MD	South Street Family, LLC 703.942.6610	Y	56	56	TBD	TBD	N
15	South Street Senior Frederick, MD	South Street Senior, LLC 703.942.6610	Y	96	96	TBD	TBD	N
16	Helena Crocker Residences Westford, MA	Helena Crocker Residences LP 978.535.5600	Y	18	18	TBD	TBD	N
17	Parkside at Main Simpsonville, SC	Parkside at Main, LP 703.942.6610	Y	42	42	2/17/2021	2/24/2021	N
18	Parkside at Hudson Gastonia, NC	Parkside at Hudson, LP 703.942.6610	Y	80	80	11/6/2020	9/15/2021	N
19	Dogwood Trail Albany, GA	Dogwood Trail Apartments, LP 703.942.6610	Y	64	61	12/31/2020	2/25/2022	N
20	Springhill Apartments Madison, FL	Springhill Apartments, LLC 703.942.6610	Y	76	76	12/20/2019	8/19/2022	N

\* Must have the ability to bind the LIHTC entity; document with partnership/operating agreements and one 8609 (per entity/development) for a total of 6.

1st PAGE

TOTAL: 1,630 1,606

LIHTC as % of  
99% Total Units

ADD ADDITIONAL PROPERTIES USING NEXT TAB



Previous Participation Certification continued

	Development Name/Location	Name of Ownership Entity and Phone Number	Controlling General Partner? (Y/N)	Total Units	Low Income Units	Placed in Service Date	8609 Date	Non-compliance Found? Y/N (Explain Yes)
21	Parkside at Drayton Spartanburg, SC	Parkside at Drayton, LP 703.942.6610	Y	41	41	4/1/2019	1/27/2020	N
22	Perrytown Apartments Perry, FL	Perrytown Apartments, LL 703.942.6610	Y	100	100	5/21/2018	12/22/2020	N
23	Momentum at Shady Grove Derwood, MD	Momentum Apartments, 703.942.6610	Y	110	110	10/18/2019	2/9/2021	N
24	Douglass Village Douglassville, GA	Douglass Village Apartm 703.942.6610	Y	88	88	12/20/2018	8/26/2021	N
25	Hand Trading Company Apartments Pelham, GA	Hand TC Restoration, LP 703.942.6610	Y	54	44	12/16/2019	2/2/2021	N
26	The Forge on Broadway Buffalo, NY	SAAKC Buffalo Forge, LLC 978.535.5600	Y	158	141	7/31/2020	1/28/2022	N
27	Castle Creek Aspen, CO	488 Castle Creek, LLC 703.942.6610	Y	24	24	3/20/2018	7/16/2019	N
28	Ashton Cove Kingsland, GA	Kingsland Cove, LP 703.942.6610	Y	72	72	9/27/2018	6/17/2019	N
29	St James Terrace Baltimore, MD	St. James Apartments LP 703.942.6610	Y	151	151	7/20/2018	3/13/2019	N
30	Chelmsford Wood Residences II Chelmsford, MA	Chelmsford Woods Resid 978.535.5600	Y	58	58	7/6/2018	3/19/2019	N
31	Parkside at Bethel Clover, SC	Parkside at Bethel LP 703.942.6610	Y	42	42	5/11/2018	2/25/2019	N
32	Market Station Thomasville, GA	Market Station Apartmen 703.942.6610	Y	80	80	3/31/2018	10/3/2018	N
33	Coady School Residences Bourne, MA	Coady School Residence 978.535.5600	Y	58	58	8/25/2017	5/8/2018	N
34	Page Woodson Oklahoma City, OK	Page Woodson Develop 703.942.6610	Y	128	128	7/14/2017	11/26/2018	N
35	Park Heights Baltimore, MD	New Park Heights LLC 703.942.6610	Y	100	100	6/30/2017	4/17/2018	N
36	Residences at Government Center I Fairfax, VA	Fairfax Corner Partners LL 703.942.6610	Y	150	15	2/28/2017	9/27/2017	N
37	Residences at Government Center II Fairfax, VA	Fairfax Corner Partners II 703.942.6610	Y	120	120	2/28/2017	10/19/2017	N
38	Southfork Camilla, GA	Southfork Apartments LP 703.942.6610	Y	96	96	8/25/2016	3/14/2017	N
39	Parkside at Boulevard Orangeburg, SC	Parkside at Boulevard LP 703.942.6610	Y	44	44	7/29/2016	1/27/2017	N
40	Cypress Parc New Orleans, LA	FBT Community Develop 703.942.6610	Y	62	62	5/31/2016	3/10/2017	N
41	Chelmsford Woods Residences Chelmsford, MA	Chelmsford Woods Resid 978.535.5300	Y	58	58	2/26/2016	10/5/2016	N
42	Eureka Heights Ashburn GA	Eureka Heights, LP 703.942.6610	Y	56	56	6/30/2015	3/3/2016	N
43	Tangi Village Hammond, LA	Quick Blvd. Apartments L 703.942.6610	Y	61	61	11/30/2014	11/6/2015	N
44	Simpkins School Yarmouth, MA	Simpkins School Residenc 978.535.5600	Y	65	58	9/29/2014	5/18/2015	N
45	Ashley House Valdosta, GA	Ashley House Apartments 703.942.6610	Y	61	61	8/1/2014	6/2/2015	N
46	Elm Drive Senior Apartments Baton Rouge, LA	Elm Drive Senior Apartme 703.942.6610	Y	60	60	5/1/2014	11/6/2015	N
47	The Reserve at Sugar Mill St. Marys, GA	Ashton Pines Apartments, 703.942.6610	Y	70	70	10/26/2012	10/17/2013	N
48	Griffin Heights Tallahassee, FL	New Griffin Apartments, L 703.942.6610	Y	100	100	22/23/2012	1/11/2013	N
49	Pine Meadow Gainesville, FL	Pine Meadow Redevelop 703.942.6610	Y	78	78	12/7/2011	6/14/2013	N
50	Sand Dunes Panama City Beach, FL	Sand Dunes Redevelopm 703.942.6610	Y	104	104	12/7/2011	6/14/2013	N
51	Cypress Place Marrero, LA	1500 Westwood, LP 703.942.6610	Y	132	132	11/7/2011	11/8/2013	N
52	Three Tree Flats Washington, DC	3910 Georgia Avenue As 703.942.6610	Y	130	119	2/25/2011	1/24/2012	N
53	Lakeside Columbia, SC	New Lakeside Apartment 703.942.6610	Y	110	109	12/2/2010	2/24/2011	N
54	School Street Residences Athol, MA	School Street Residences 978.535.5600	Y	50	50	12/1/2010	12/30/2011	N
55	Fulton School Weymouth, MA	Fulton School Residences 978.535.5600	Y	63	63	11/2/2009	12/31/2010	N
56	Appian Way North Charleston, SC	8465 Patriot Boulevard, L 703.942.6610	N	204	204	6/1/2009	6/12/2009	N

2nd PAGE TOTAL: 3,138 2,957

GRAND TOTAL: 4,768 4,563

LIHTC as % of  
96% Total Unit



# List of LIHTC Developments (Schedule A)



Development Name: Somos Phase B

Name of Applicant: Somos Phase B, LLC

## INSTRUCTIONS:

- 1 A Schedule A is required for **every** individual that makes up the GP or Managing Member - does not apply to principals of publicly traded corporations.
- 2 For each property for which an uncorrected 8823 has been issued, provide a detailed explanation of the nature of the non-compliance, as well as a status statement.
- 3 List only tax credit development experience since 2007 (i.e. for the past 15 years)
- 4 Use separate pages as needed, for each principal.

Principal's Name: Wilson Ventures II, LLC Controlling GP (CGP) or 'Named' Managing Member of Proposed property? Y  
Y or N

	Development Name/Location	Name of Ownership Entity and Phone Number	CGP or 'Named' Managing Member at the time of dev.? (Y/N)*	Total Dev. Units	Total Low Income Units	Placed in Service Date	8609(s) Issue Date	Uncorrected 8823's? (Y/N) Explain "Y"
1	Coyle School Residences, LP Taunton, MA	Coyle School Residences 703.942.6610	Y	50	45	TBD	TBD	N
2	Ovata at Reedy Creek, LP Charlotte, NC	Ovata at Reedy Creek, LP 703.942.6610	Y	78	78	TBD	TBD	N
3	500 Northside Station Spartanburg, SC	Partans, LLC 703.942.6610	Y	90	81	7/30/2021	9/1/2022	N
4	Renaissance Place Greenville, SC	Renaissance Place, LP 703.942.6610	Y	57	57	10/11/2019	3/4/2022	N
5	Silver Creek Kensington, MD	Knowles Manor Senior Housing LLC 703.942.6610	Y	94	94	12/28/2021	7/31/2023	N
6	Parkside at Hickory Grove Charlotte, NC	Parkside at Hickory Grove, LP 703.942.6610	Y	80	80	10/1/2021	12/15/2022	N
7	Ovation at Arrowbrook I Herndon, VA	Arrowbrook Apartments I, LLC 703.942.6610	Y	126	126	3/30/2023	TBD	N
8	Ovation at Arrowbrook II Herndon, VA	Arrowbrook Apts II, LLC 703.942.6610	Y	148	148	4/14/2023	TBD	N
9	Oxford School Residences Fairhaven, MA	Oxford School Residences LP 978.535.5600	Y	52	45	6/13/2022	4/3/2023	N
10	One University Family Fairfax, VA	One University Family, LLC 703.942.6610	Y	120	120	TBD	TBD	N
11	One University Senior Fairfax, VA	One University Senior, LLC 703.942.6610	Y	120	120	TBD	TBD	N
12	Parkside at Butler Mauldin, SC	Parkside at Butler, LP 703.942.6610	Y	72	72	2/15/2023	TBD	N
13	Frederick Road Senior Housing Gaithersburg, MD	Frederick Road Senior 4% Owner LLC 703.942.6610	Y	111	111	TBD	TBD	N
14	South Street Family Frederick, MD	South Street Family, LLC 703.942.6610	Y	56	56	TBD	TBD	N
15	South Street Senior Frederick, MD	South Street Senior, LLC 703.942.6610	Y	96	96	TBD	TBD	N
16	Helena Crocker Residences Westford, MA	Helena Crocker Residences LP 978.535.5600	Y	18	18	TBD	TBD	N
17	Parkside at Main Simpsonville, SC	Parkside at Main, LP 703.942.6610	Y	42	42	2/17/2021	2/24/2021	N
18	Parkside at Hudson Gastonia, NC	Parkside at Hudson, LP 703.942.6610	Y	80	80	11/6/2020	9/15/2021	N
19	Dogwood Trail Albany, GA	Dogwood Trail Apartments, LP 703.942.6610	Y	64	61	12/31/2020	2/25/2022	N
20	Springhill Apartments Madison, FL	Springhill Apartments, LLC 703.942.6610	Y	76	76	12/20/2019	8/19/2022	N

\* Must have the ability to bind the LIHTC entity; document with partnership/operating agreements and one 8609 (per entity/development) for a total of 6.

1st PAGE

TOTAL: 1,630 1,606

LIHTC as % of  
99% Total Units

ADD ADDITIONAL PROPERTIES USING NEXT TAB

Previous Participation Certification continued

	Development Name/Location	Name of Ownership Entity and Phone Number	Controlling General Partner? (Y/N)	Total Units	Low Income Units	Placed in Service Date	8609 Date	Non-compliance Found? Y/N (Explain Yes)
21	Parkside at Drayton Spartanburg, SC	Parkside at Drayton, LP 703.942.6610	Y	41	41	4/1/2019	1/27/2020	N
22	Perrytown Apartments Perry, FL	Perrytown Apartments, LL 703.942.6610	Y	100	100	5/21/2018	12/22/2020	N
23	Momentum at Shady Grove Derwood, MD	Momentum Apartments, 703.942.6610	Y	110	110	10/18/2019	2/9/2021	N
24	Douglass Village Douglassville, GA	Douglass Village Apartm 703.942.6610	Y	88	88	12/20/2018	8/26/2021	N
25	Hand Trading Company Apartments Pelham, GA	Hand TC Restoration, LP 703.942.6610	Y	54	44	12/16/2019	2/2/2021	N
26	The Forge on Broadway Buffalo, NY	SAAKC Buffalo Forge, LLC 978.535.5600	Y	158	141	7/31/2020	1/28/2022	N
27	Castle Creek Aspen, CO	488 Castle Creek, LLC 703.942.6610	Y	24	24	3/20/2018	7/16/2019	N
28	Ashton Cove Kingsland, GA	Kingsland Cove, LP 703.942.6610	Y	72	72	9/27/2018	6/17/2019	N
29	St James Terrace Baltimore, MD	St. James Apartments LP 703.942.6610	Y	151	151	7/20/2018	3/13/2019	N
30	Chelmsford Wood Residences II Chelmsford, MA	Chelmsford Woods Resid 978.535.5600	Y	58	58	7/6/2018	3/19/2019	N
31	Parkside at Bethel Clover, SC	Parkside at Bethel LP 703.942.6610	Y	42	42	5/11/2018	2/25/2019	N
32	Market Station Thomasville, GA	Market Station Apartmen 703.942.6610	Y	80	80	3/31/2018	10/3/2018	N
33	Coady School Residences Bourne, MA	Coady School Residence 978.535.5600	Y	58	58	8/25/2017	5/8/2018	N
34	Page Woodson Oklahoma City, OK	Page Woodson Develop 703.942.6610	Y	128	128	7/14/2017	11/26/2018	N
35	Park Heights Baltimore, MD	New Park Heights LLC 703.942.6610	Y	100	100	6/30/2017	4/17/2018	N
36	Residences at Government Center I Fairfax, VA	Fairfax Corner Partners LL 703.942.6610	Y	150	15	2/28/2017	9/27/2017	N
37	Residences at Government Center II Fairfax, VA	Fairfax Corner Partners II 703.942.6610	Y	120	120	2/28/2017	10/19/2017	N
38	Southfork Camilla, GA	Southfork Apartments LP 703.942.6610	Y	96	96	8/25/2016	3/14/2017	N
39	Parkside at Boulevard Orangeburg, SC	Parkside at Boulevard LP 703.942.6610	Y	44	44	7/29/2016	1/27/2017	N
40	Cypress Parc New Orleans, LA	FBT Community Develop 703.942.6610	Y	62	62	5/31/2016	3/10/2017	N
41	Chelmsford Woods Residences Chelmsford, MA	Chelmsford Woods Resid 978.535.5300	Y	58	58	2/26/2016	10/5/2016	N
42	Eureka Heights Ashburn GA	Eureka Heights, LP 703.942.6610	Y	56	56	6/30/2015	3/3/2016	N
43	Tangi Village Hammond, LA	Quick Blvd. Apartments L 703.942.6610	Y	61	61	11/30/2014	11/6/2015	N
44	Simpkins School Yarmouth, MA	Simpkins School Residenc 978.535.5600	Y	65	58	9/29/2014	5/18/2015	N
45	Ashley House Valdosta, GA	Ashley House Apartments 703.942.6610	Y	61	61	8/1/2014	6/2/2015	N
46	Elm Drive Senior Apartments Baton Rouge, LA	Elm Drive Senior Apartme 703.942.6610	Y	60	60	5/1/2014	11/6/2015	N
47	The Reserve at Sugar Mill St. Marys, GA	Ashton Pines Apartments, 703.942.6610	Y	70	70	10/26/2012	10/17/2013	N
48	Griffin Heights Tallahassee, FL	New Griffin Apartments, L 703.942.6610	Y	100	100	22/23/2012	1/11/2013	N
49	Pine Meadow Gainesville, FL	Pine Meadow Redevelop 703.942.6610	Y	78	78	12/7/2011	6/14/2013	N
50	Sand Dunes Panama City Beach, FL	Sand Dunes Redevelopm 703.942.6610	Y	104	104	12/7/2011	6/14/2013	N
51	Cypress Place Marrero, LA	1500 Westwood, LP 703.942.6610	Y	132	132	11/7/2011	11/8/2013	N
52	Three Tree Flats Washington, DC	3910 Georgia Avenue As 703.942.6610	Y	130	119	2/25/2011	1/24/2012	N
53	Lakeside Columbia, SC	New Lakeside Apartment 703.942.6610	Y	110	109	12/2/2010	2/24/2011	N
54	School Street Residences Athol, MA	School Street Residences 978.535.5600	Y	50	50	12/1/2010	12/30/2011	N
55	Fulton School Weymouth, MA	Fulton School Residences 978.535.5600	Y	63	63	11/2/2009	12/31/2010	N
56	Appian Way North Charleston, SC	8465 Patriot Boulevard, L 703.942.6610	N	204	204	6/1/2009	6/12/2009	N

2nd PAGE TOTAL: 3,138 2,957

GRAND TOTAL: 4,768 4,563

LIHTC as % of  
96% Total Unit

# List of LIHTC Developments (Schedule A)



Development Name: Somos Phase B

Name of Applicant: Somos Phase B, LLC

## INSTRUCTIONS:

- 1 A Schedule A is required for **every** individual that makes up the GP or Managing Member - does not apply to principals of publicly traded corporations.
- 2 For each property for which an uncorrected 8823 has been issued, provide a detailed explanation of the nature of the non-compliance, as well as a status statement.
- 3 List only tax credit development experience since 2007 (i.e. for the past 15 years)
- 4 Use separate pages as needed, for each principal.

Principal's Name: 421 Corp. Controlling GP (CGP) or 'Named' Managing Member of Proposed property? Y or N

	Development Name/Location	Name of Ownership Entity and Phone Number	CGP or 'Named' Managing Member at the time of dev.? (Y/N)*	Total Dev. Units	Total Low Income Units	Placed in Service Date	8609(s) Issue Date	Uncorrected 8823's? (Y/N) Explain "Y"
1	Coyle School Residences, LP Taunton, MA	Coyle School Residences 703.942.6610	Y	50	45	TBD	TBD	N
2	Ovata at Reedy Creek, LP Charlotte, NC	Ovata at Reedy Creek, LP 703.942.6610	Y	78	78	TBD	TBD	N
3	500 Northside Station Spartanburg, SC	Partans, LLC 703.942.6610	Y	90	81	7/30/2021	9/1/2022	N
4	Renaissance Place Greenville, SC	Renaissance Place, LP 703.942.6610	Y	57	57	10/11/2019	3/4/2022	N
5	Silver Creek Kensington, MD	Knowles Manor Senior Housing LLC 703.942.6610	Y	94	94	12/28/2021	7/31/2023	N
6	Parkside at Hickory Grove Charlotte, NC	Parkside at Hickory Grove, LP 703.942.6610	Y	80	80	10/1/2021	12/15/2022	N
7	Ovation at Arrowbrook I Herndon, VA	Arrowbrook Apartments I, LLC 703.942.6610	Y	126	126	3/30/2023	TBD	N
8	Ovation at Arrowbrook II Herndon, VA	Arrowbrook Apts II, LLC 703.942.6610	Y	148	148	4/14/2023	TBD	N
9	Oxford School Residences Fairhaven, MA	Oxford School Residences LP 978.535.5600	Y	52	45	6/13/2022	4/3/2023	N
10	One University Family Fairfax, VA	One University Family, LLC 703.942.6610	Y	120	120	TBD	TBD	N
11	One University Senior Fairfax, VA	One University Senior, LLC 703.942.6610	Y	120	120	TBD	TBD	N
12	Parkside at Butler Mauldin, SC	Parkside at Butler, LP 703.942.6610	Y	72	72	2/15/2023	TBD	N
13	Frederick Road Senior Housing Gaithersburg, MD	Frederick Road Senior 4% Owner LLC 703.942.6610	Y	111	111	TBD	TBD	N
14	South Street Family Frederick, MD	South Street Family, LLC 703.942.6610	Y	56	56	TBD	TBD	N
15	South Street Senior Frederick, MD	South Street Senior, LLC 703.942.6610	Y	96	96	TBD	TBD	N
16	Helena Crocker Residences Westford, MA	Helena Crocker Residences LP 978.535.5600	Y	18	18	TBD	TBD	N
17	Parkside at Main Simpsonville, SC	Parkside at Main, LP 703.942.6610	Y	42	42	2/17/2021	2/24/2021	N
18	Parkside at Hudson Gastonia, NC	Parkside at Hudson, LP 703.942.6610	Y	80	80	11/6/2020	9/15/2021	N
19	Dogwood Trail Albany, GA	Dogwood Trail Apartments, LP 703.942.6610	Y	64	61	12/31/2020	2/25/2022	N
20	Springhill Apartments Madison, FL	Springhill Apartments, LLC 703.942.6610	Y	76	76	12/20/2019	8/19/2022	N

\* Must have the ability to bind the LIHTC entity; document with partnership/operating agreements and one 8609 (per entity/development) for a total of 6.

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99% Total Units

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Previous Participation Certification continued

	Development Name/Location	Name of Ownership Entity and Phone Number	Controlling General Partner? (Y/N)	Total Units	Low Income Units	Placed in Service Date	8609 Date	Non-compliance Found? Y/N (Explain Yes)
21	Parkside at Drayton Spartanburg, SC	Parkside at Drayton, LP 703.942.6610	Y	41	41	4/1/2019	1/27/2020	N
22	Perrytown Apartments Perry, FL	Perrytown Apartments, LLC 703.942.6610	Y	100	100	5/21/2018	12/22/2020	N
23	Momentum at Shady Grove Derwood, MD	Momentum Apartments, 703.942.6610	Y	110	110	10/18/2019	2/9/2021	N
24	Douglass Village Douglassville, GA	Douglass Village Apartm 703.942.6610	Y	88	88	12/20/2018	8/26/2021	N
25	Hand Trading Company Apartments Pelham, GA	Hand TC Restoration, LP 703.942.6610	Y	54	44	12/16/2019	2/2/2021	N
26	The Forge on Broadway Buffalo, NY	SAAKC Buffalo Forge, LLC 978.535.5600	Y	158	141	7/31/2020	1/28/2022	N
27	Castle Creek Aspen, CO	488 Castle Creek, LLC 703.942.6610	Y	24	24	3/20/2018	7/16/2019	N
28	Ashton Cove Kingsland, GA	Kingsland Cove, LP 703.942.6610	Y	72	72	9/27/2018	6/17/2019	N
29	St James Terrace Baltimore, MD	St. James Apartments LP 703.942.6610	Y	151	151	7/20/2018	3/13/2019	N
30	Chelmsford Wood Residences II Chelmsford, MA	Chelmsford Woods Resid 978.535.5600	Y	58	58	7/6/2018	3/19/2019	N
31	Parkside at Bethel Clover, SC	Parkside at Bethel LP 703.942.6610	Y	42	42	5/11/2018	2/25/2019	N
32	Market Station Thomasville, GA	Market Station Apartmen 703.942.6610	Y	80	80	3/31/2018	10/3/2018	N
33	Coady School Residences Bourne, MA	Coady School Residence 978.535.5600	Y	58	58	8/25/2017	5/8/2018	N
34	Page Woodson Oklahoma City, OK	Page Woodson Develop 703.942.6610	Y	128	128	7/14/2017	11/26/2018	N
35	Park Heights Baltimore, MD	New Park Heights LLC 703.942.6610	Y	100	100	6/30/2017	4/17/2018	N
36	Residences at Government Center I Fairfax, VA	Fairfax Corner Partners LL 703.942.6610	Y	150	15	2/28/2017	9/27/2017	N
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38	Southfork Camilla, GA	Southfork Apartments LP 703.942.6610	Y	96	96	8/25/2016	3/14/2017	N
39	Parkside at Boulevard Orangeburg, SC	Parkside at Boulevard LP 703.942.6610	Y	44	44	7/29/2016	1/27/2017	N
40	Cypress Parc New Orleans, LA	FBT Community Develop 703.942.6610	Y	62	62	5/31/2016	3/10/2017	N
41	Chelmsford Woods Residences Chelmsford, MA	Chelmsford Woods Resid 978.535.5300	Y	58	58	2/26/2016	10/5/2016	N
42	Eureka Heights Ashburn GA	Eureka Heights, LP 703.942.6610	Y	56	56	6/30/2015	3/3/2016	N
43	Tangi Village Hammond, LA	Quick Blvd. Apartments L 703.942.6610	Y	61	61	11/30/2014	11/6/2015	N
44	Simpkins School Yarmouth, MA	Simpkins School Residenc 978.535.5600	Y	65	58	9/29/2014	5/18/2015	N
45	Ashley House Valdosta, GA	Ashley House Apartments 703.942.6610	Y	61	61	8/1/2014	6/2/2015	N
46	Elm Drive Senior Apartments Baton Rouge, LA	Elm Drive Senior Apartme 703.942.6610	Y	60	60	5/1/2014	11/6/2015	N
47	The Reserve at Sugar Mill St. Marys, GA	Ashton Pines Apartments, 703.942.6610	Y	70	70	10/26/2012	10/17/2013	N
48	Griffin Heights Tallahassee, FL	New Griffin Apartments, L 703.942.6610	Y	100	100	22/23/2012	1/11/2013	N
49	Pine Meadow Gainesville, FL	Pine Meadow Redevelop 703.942.6610	Y	78	78	12/7/2011	6/14/2013	N
50	Sand Dunes Panama City Beach, FL	Sand Dunes Redevelopm 703.942.6610	Y	104	104	12/7/2011	6/14/2013	N
51	Cypress Place Marrero, LA	1500 Westwood, LP 703.942.6610	Y	132	132	11/7/2011	11/8/2013	N
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54	School Street Residences Athol, MA	School Street Residences 978.535.5600	Y	50	50	12/1/2010	12/30/2011	N
55	Fulton School Weymouth, MA	Fulton School Residences 978.535.5600	Y	63	63	11/2/2009	12/31/2010	N
56	Appian Way North Charleston, SC	8465 Patriot Boulevard, L 703.942.6610	N	204	204	6/1/2009	6/12/2009	N

2nd PAGE TOTAL: 3,138 2,957

GRAND TOTAL: 4,768 4,563

LIHTC as % of  
96% Total Unit

# **Tab E:**

Site Control Documentation & Most Recent Real  
Estate Tax Assessment (MANDATORY)

**OPTION TO LEASE  
(SOMOS PHASE B-4)**

This Option to Lease (the “Option”) is dated December 21, 2022, by and between FAIRFAX COUNTY REDEVELOPMENT AND HOUSING AUTHORITY, a political subdivision of the Commonwealth of Virginia (“Landlord” or “FCRHA”) and SCG DEVELOPMENT PARTNERS, LLC, a Delaware limited liability company, or its permitted assignee or designee (“Tenant”).

WHEREAS, Landlord owns certain real property in fee simple, identified as 1750 Old Meadow Road, McLean Virginia, and more particularly described as Lot 100, Section 1 of the Subdivision of Westgate Research Park, as the same is duly dedicated, platted, and recorded in Deed Book 2782 at Page 615, among the land records of Fairfax County, Virginia, and intends to lease a portion of that real property(together with any of its interests in certain easements, development rights and interests with respect to the real property), such portion of the real property being more particularly identified on the attached Exhibit A (the “Premises”);

WHEREAS, in order to finance in part the design, development and construction of one building consisting of approximately 123 affordable residential units, with garage parking and related public areas (collectively, the “Project”) on the Premises, Tenant shall apply for tax credits (“Tax Credits”) pursuant to the Virginia Housing Development Authority’s Federal Low Income Housing Tax Credit Program Application (the “Application”);

WHEREAS, Landlord wishes to grant Tenant an option to lease the Premises under a long-term ground lease, the form of which has been agreed to by Landlord and Tenant (the “Ground Lease”) and Tenant wishes to accept the option.

NOW, THEREFORE, in consideration of the mutual covenants and agreements contained herein, and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the parties agree as follows:

1. Grant of Option. Landlord, upon Tenant’s receipt of an award of Tax Credits and in consideration of \$10.00, which shall be non-refundable, paid by Tenant to Landlord, receipt of which is hereby acknowledged, grants to Tenant the exclusive right and option to lease the Premises on the following terms and conditions. If Tenant does not receive an award of Tax Credits by the Initial Tax Credit Date, as may be extended pursuant to Section 2 below, or fails to enter into the Ground Lease by the Closing Expiration Date as may be extended pursuant to Section 2 below, this Option will automatically terminate.

2. Option Period. The term of this Option shall commence on the date first written above and continue until 5:00 p.m. on the date that is 365 days after an award from Virginia Housing of low-income housing tax credits for the Project (the “Closing Expiration Date”). Tenant shall have until December 1, 2023 (the “Initial Tax Credit Date”) to receive an award of such tax credits. If Tenant’s application is not approved for Tax Credits on or before the Initial Tax Credit Date, Tenant shall have three successive one time rights to re-apply for Tax Credits

in each of calendar years 2024, 2025, and 2026 by sending written notice to Landlord and, in such event, this Option shall remain in full force and effect. Notwithstanding anything to the contrary in the foregoing, the Closing Expiration Date may be extended for up to an additional six months provided Tenant gives prior written notice of same to Landlord. After the initial six-month extension, Tenant may further extend the Closing Expiration Date for up to an additional six months, with Landlord's prior consent, which shall not be unreasonably withheld.

3. Ground Lease. Tenant shall be permitted to assign and encumber its leasehold interest under the Ground Lease, in accordance with the terms of the Ground Lease, as security for debt financing for the Project. This Option shall not be recorded; however, a memorandum of the Ground Lease is expected to be recorded or memorialized in the appropriate office of public records, in accordance with the laws of the Commonwealth of Virginia. All costs of transfer and such recordation will be borne by Tenant. The Base Rent, as defined in the Ground Lease, shall include with respect to each calendar year an amount equal to One and 00/100 Dollars (\$1.00), and then, commencing with the payment in full of all subordinate financing for the Project, the Base Rent will increase to include an amount equal to 30% of the Project's net cash flow; or as otherwise agreed to by the parties.

4. Exercise of Option. Tenant may exercise this Option by giving Landlord written notice, signed by Tenant, on or before the Closing Expiration Date, as may be extended, subject to the approval and requirements of Fairfax County, Virginia and the requirements of the FCRHA as set forth in that certain Contract to Ground Lease of even date herewith and such other documents as are required by the FCRHA.

5. Proof of Title. Tenant may, at Tenant's expense, obtain a title commitment for the issuance of a leasehold insurance policy for the Premises. Tenant shall deliver a copy of any such commitment to Landlord.

6. Failure to Exercise Option. If Tenant does not exercise this Option in accordance with its terms and before the Expiration Date (or Extended Expiration Date, if applicable), this Option and the rights of Tenant hereunder will automatically and immediately terminate without notice. If Tenant fails to exercise this Option, Landlord will retain the sum paid as consideration for this Option.

7. Notices. All notices provided for in this Option will be deemed to have been duly given or served as follows: (a) by personal delivery (with receipt acknowledged), (b) delivered by reputable, national overnight delivery service (with its confirmatory receipt therefor), next business day delivery specified, or (c) sent by registered or certified United States mail, postage prepaid, return receipt requested, in each case addressed to the party for whom intended at the party's address listed above.

8. Binding Effect. This Option will be binding upon and inure only to the benefit of the parties to it and of any mutually-agreed successors and/or assigns, and of any permitted assigns pursuant to a Permitted Assignment (as hereinafter defined). Capitalized terms used but not specifically defined herein shall be defined in the Ground Lease.

9. Assignment. Tenant may, without the prior written consent of Landlord or FCRHA, assign its interest in this Option to an entity controlled, operated or managed by SCG Development Partners, LLC (“Permitted Assignment”). Other than a Permitted Assignment, Tenant will not assign its interest in the Option without the prior written consent of Landlord.

[Signature Pages Follow]



[SIGNATURE PAGE TO OPTION TO LEASE- LANDLORD]

In witness whereof, Landlord and Tenant have executed this Option on the date first written above.

**LANDLORD:**

**FAIRFAX COUNTY REDEVELOPMENT AND HOUSING AUTHORITY**, a political subdivision of the Commonwealth of Virginia

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

Name: Thomas E. Fleetwood

Title: Assistant Secretary

[Signatures Continue on Next Page]


[SIGNATURE PAGE TO OPTION TO LEASE– TENANT]

**TENANT:**

**SCG DEVELOPMENT PARTNERS, LLC,**  
a Delaware limited liability company

By: SCG Development Manager, LLC  
Its Managing Member

By: SCG Capital Corp.  
Its Sole Member

By:   
Name: Stephen P. Wilson  
Title: President – Virginia Office

[Exhibits Begin on Next Page]



**FIRST AMENDMENT TO AND  
FIRST ASSIGNMENT OF  
OPTION TO LEASE**

**(SOMOS PHASE B)**

THIS FIRST AMENDMENT TO AND FIRST ASSIGNMENT OF OPTION TO LEASE (“Amendment”) is made effective as of this 31<sup>st</sup> day of December, 2023 (the “Amendment Date”) by and among FAIRFAX COUNTY REDEVELOPMENT AND HOUSING AUTHORITY, a political subdivision of the Commonwealth of Virginia (“Landlord” or “FCRHA”), SCG DEVELOPMENT PARTNERS, LLC, a Delaware limited liability company (“Assignor”), and SOMOS PHASE B, LLC, a Virginia limited liability company (the “Assignee”, and together with Landlord and Assignor, collectively, the “Parties”).

RECITALS

WHEREAS, FCRHA entered into that certain Option to Lease effective as of December 21, 2022 (the “Option”) with Assignor, granting Assignor the option to lease certain real property located in Fairfax County, Virginia, commonly known as Phase B-4, as further described in “Exhibit A” attached to, and made a part of, said Option, together with those rights and appurtenances described in the Option (the “Premises”); and

WHEREAS, in accordance with the provisions of Section 9 of the Option, Assignor now desires to assign to the Assignee, and the Assignee wishes to assume such assignment of, all of Assignor's right, title, interest, and obligations in and to the Option with respect to the Premises, upon the terms and conditions as more particularly set forth herein; and

WHEREAS, Assignee is an entity controlled, operated, and managed by Assignor, and in accordance with the provisions of Section 9 of the Option, Assignor may therefore assign its interests in the Option to Assignee without the prior written consent of FCRHA; and

WHEREAS, pursuant to Section 2 of the Option, Assignor may extend the Initial Tax Credit Date and the term of the Option by providing the FCRHA with written notice of Assignor's election of same (the “Required Notice of Extension of Option”); and

WHEREAS, FCRHA separately entered into that certain Option to Lease effective as of December 21, 2022 (the “Phase B-9 Option”) with Assignor, granting Assignor the option to lease certain real property located in Fairfax County, Virginia, commonly known as Phase B-9, as further described in “Exhibit A” attached to, and made a part of, said Phase B-9 Option, together with those rights and appurtenances described in the Phase B-9 Option (the “Phase B-9 Premises”); and

WHEREAS, the Phase B-9 Option has been terminated as of the Amendment Date;

WHEREAS, the Parties also wish to amend the Option to update the legal description of the Premises to add and include the Phase B-9 Premises, and to otherwise amend certain provisions of the Option, as more fully set forth herein.

### AGREEMENT

NOW THEREFORE, in consideration of the foregoing, of mutual promises set forth herein, and of other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the parties hereto, intending to be legally bound, hereby agree as follows:

1. Assignment of Rights and Obligations under the Option. In consideration for the payment of (a) Ten Dollars (\$10.00) from the Assignee, cash in hand paid, receipt of which is acknowledged, and (b) the assumption by the Assignee of Assignor's liabilities and obligations under the Option with respect to the Premises, the Assignor, pursuant to Section 9 of the Option, hereby transfers, assigns, conveys and sets over all of Assignor's right, title, interest, and obligations held by Assignor in, to, and under the Option to the Assignee with respect to the Premises (the "Assignment").

2. Representations by Assignor. Assignor makes the following representations and warranties to the Assignee: that Assignor (a) has the full right, title, power, capacity and authority to validly transfer, assign, convey and set over Assignor's rights, title, interest, and obligations in, to, and under the Option with respect to the Premises being assumed by the Assignee, and (b) is not a party to any agreement to sell, hypothecate or otherwise dispose of the rights and obligations under the Option with respect to the Premises, nor has it otherwise sold, hypothecated or disposed of any interest in the Option with respect to the Premises to any parties other than the Assignee.

3. Legal Description. The Option is hereby amended by deleting Exhibit A thereof in its entirety, and inserting the Exhibit A attached to this Amendment in lieu thereof. Except as otherwise provided in this Amendment, from and after the Amendment Date, references to the term "Premises" and Exhibit A in the Option will mean and refer to Exhibit A as hereby amended.

4. Option Period in Full Force and Effect. The Parties acknowledge and agree, as applicable, that: Assignor's Application for Tax Credits for calendar year 2023 was not approved; Assignor will be re-applying for Tax Credits pursuant to a separate Application in calendar year 2024 (the "2024 Application"), and the Closing Expiration Date has been adjusted accordingly to accommodate the Second Tax Credit Date (as hereinafter defined); Assignor (or its successor or assigns) has provided FCRHA with the Required Notice of Extension of Option in compliance with Section 2 of the Option, as further evidenced by the Acknowledgement of Notice of Extension of Option attached hereto as Exhibit B; the Option remains in full force and effect, in accordance with, and in compliance with the requirements of, Section 2 of the Option. Assignor shall have until December 1, 2024 (the "Second Tax Credit Date") to receive an award of Tax Credits pursuant to the 2024 Application. If Assignor's 2024 Application is not approved for Tax Credits on or before the Second Tax Credit Date, in accordance with Section 2 of the Option, Assignor shall have two more successive one time rights to re-apply for Tax Credits in

each of calendar years 2025 and 2026 by sending written notice to Landlord and, in such event, the Option shall remain in full force and effect.

5. Recitals. Each recital set forth above is incorporated herein by this reference and made a part of this Amendment among the Parties.

6. Defined Terms. All capitalized terms not defined herein shall have the respective meanings assigned to them in the Option.

7. Counterparts. The parties agree that this Amendment may be executed by the parties in one or more counterparts, and each of which shall be deemed an original, but all of which together shall constitute one and the same instrument.

8. Binding Effect. This Amendment shall inure to the benefit of and shall be binding upon the parties hereto and their respective successors and assigns.

9. No impairment. Except as specifically amended hereby, all other provisions of the Option shall remain unaffected by this Amendment and all such provisions shall remain in full force and effect.

[Signatures Begin on Next Page]

IN WITNESS WHEREOF, the Parties have caused this First Amendment to and First Assignment of Option to Lease to be executed effective as of the Amendment Date.

**LANDLORD:**

**FAIRFAX COUNTY REDEVELOPMENT AND HOUSING AUTHORITY,**  
a political subdivision of the Commonwealth of Virginia

By: 

Name: Thomas E. Fleetwood

Title: Assistant Secretary

**ASSIGNOR:**

**SCG DEVELOPMENT PARTNERS, LLC,**  
a Delaware limited liability company

By: SCG Development Manager, LLC,  
its managing member

By: SCG Capital Corp.,  
its sole member

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

Name: Stephen P. Wilson

Title: President – Virginia Office



### ACCEPTANCE OF ASSIGNMENT

The Assignee hereby accepts the foregoing assignment of the right, title and interest and obligations held by Assignor in, to and under the Option with respect to the Premises, all as described in the foregoing Amendment.

IN WITNESS WHEREOF, the Assignee has caused this Acceptance of Assignment to be executed effective as of the Amendment Date.

#### ASSIGNEE:


**SOMOS PHASE B, LLC,**  
a Virginia limited liability company

By: Somos Phase B MM, LLC,  
its sole member

By: SCG Development Partners, LLC,  
its managing member

By: SCG Development Manager, LLC,  
its managing member

By: SCG Capital Corp.,  
its sole member

By:   
Name: Stephen P. Wilson  
Title: President – Virginia Office

**EXHIBIT A**

OCTOBER 20, 2023  
DESCRIPTION OF  
SOMOS CONDOMINIOM  
PHASE B  
BEING A PORTION  
OF THE PROPERTY OF  
FAIRFAX COUNTY  
REDEVELOPMENT AND  
HOUSING AUTHORITY  
DEED BOOK 27821 PAGE 1872  
PROVIDENCE DISTRICT  
FAIRFAX COUNTY, VIRGINIA

Being a portion of Lot 100, Section One, Westgate Research Park, as recorded in Deed Book 2782, at Page 615, being the same property acquired by Fairfax County Redevelopment and Housing Authority from 1750 Old Meadow, LLC by deed dated December 21, 2022 and recorded in Deed Book 27821, at Page 1872, all among the Land Records of Fairfax County, Virginia and being more particularly described as follows:

Beginning for the same at a point on the southerly property line of said Lot 100, Section One, Westgate Research Park, said point lying North 66°42'28" West, 11.65 feet from an iron pipe (open end), said iron pipe lying on westerly right-of-way line of Old Meadow Road- State Route 3543, 80' wide public right-of-way, as recorded in Deed Book 2751 at Page 588, said iron pipe marking the north easterly corner of the aforementioned Lot 100, Section One, Westgate Research Park, said iron pipe also being the southeasterly most corner part of lot 101-A, section one Westgate of the property of Lincoln 1700 Old Meadow Road, LLC as recorded in Deed Book 25000, at Page 854, all among the forementioned Land Records; thence running so as to cross and include a portion of aforementioned Lot 100, section one, Westgate Research Park the following nine (9) courses and distances.

1. 27.58 feet along the arc of a curve to the left having a radius of 442.82 feet and a chord bearing and distance of South 12°19'33" West, 27.58 feet to a point of tangency; thence
2. South 10°32'31 West, 331.03 feet to a point of curvature (non-tangent); thence
3. 33.70 feet along the arc of a curve to the left having a radius of 87.50 feet and a chord bearing and distance of South 85°04'14" West, 33.49 feet to a point of tangency; thence
4. South 74°02'11" West, 9.68 feet to a point of curvature (tangent); thence

5. 63.61 feet along the arc of a curve to the right having a radius of 137.50 feet and a chord bearing and distance of South  $87^{\circ}17'22''$  West, 63.05 feet to a point of tangency; thence
6. North  $79^{\circ}27'29''$  West, 35.48 feet to a point of curvature (tangent); thence
7. 50.52 feet along the arc of a curve to the left having a radius of 52.50 feet and a chord bearing and distance of South  $51^{\circ}53'31''$  East, 48.59 feet to a point of tangency; thence
8. 50.16 feet along a curve to the left having a radius of 72.50 feet and chord bearing and distance of North  $44^{\circ}08'45''$  West 49.17, to a point (non-tangent); thence
9. North  $22^{\circ}06'01''$  East, 376.17 feet to a point on the aforementioned southerly property line of Lincoln 1700 Old Meadow Road, LLC; thence running with the said southerly property line the following course and distance
10. South  $66^{\circ}42'28''$  East, 150.17 feet to the point of beginning and containing 73,288 square feet or 1.68246 acres of land more or less


**EXHIBIT B**

**ACKNOWLEDGEMENT OF NOTICE OF EXTENSION OF OPTION**  
**(SOMOS PHASE B)**

The undersigned, on behalf of FAIRFAX COUNTY REDEVELOPMENT AND HOUSING AUTHORITY, a political subdivision of the Commonwealth of Virginia ("FCRHA"), as a party to that certain Option to Lease entered into with SCG DEVELOPMENT PARTNERS, LLC, a Delaware limited liability company ("SCG"), effective as of December 21, 2022 in connection with real property located in Fairfax County, Virginia, commonly known as Somos Phase B-4 (the "Option"), acknowledges that SCG (or its successor or assigns) has provided FCRHA with the required notice to extend the term of the Option pursuant to, and in compliance with, Section 2 of the Option.

Dated effective as of: December 31, 2023

**FAIRFAX COUNTY REDEVELOPMENT AND HOUSING AUTHORITY,**  
a political subdivision of the Commonwealth of Virginia

By:   
Name: Thomas E. Fleetwood  
Title: Assistant Secretary

MAP #: 0294T06 0100A  
FAIRFAX COUNTY REDEVELOPMENT

1750 OLD MEADOW RD

Summary of 2023 Taxes

Year		General Fund Net Taxes	Special Tax District	Service Charges	Interest	Penalty	Other Charges	Amount Paid	Balance Due
2023	1ST HALF DUE	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
2023	2ND HALF DUE	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00
Total:		\$ .00	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00	\$ .00

Prepays and Refunds

Prepays	\$ .00
Pending Refunds	\$ .00
GRAND TOTAL	\$ .00

Source: Fairfax County Department  
of Tax Administration, Real Estate Division.

MAP #: 0294 06 0100A  
1750 OLD MEADOW LLC

1750 OLD MEADOW RD

### Values

Tax Year	2022
Current Land	\$7,146,600
Current Building	\$12,853,400
Current Assessed Total	\$20,000,000
Tax Exempt	NO
Note	

### Values History

Tax Year	Land	Building	Assessed Total	Tax Exempt
2021	\$7,146,600	\$7,649,420	\$14,796,020	NO
2020	\$7,861,260	\$11,388,740	\$19,250,000	NO
2019	\$7,861,260	\$11,388,740	\$19,250,000	NO
2018	\$7,861,260	\$2,150,950	\$10,012,210	NO
2017	\$7,861,260	\$1,666,990	\$9,528,250	NO
2016	\$7,861,260	\$23,111,170	\$30,972,430	NO
2015	\$7,861,260	\$21,930,220	\$29,791,480	NO
2014	\$8,575,920	\$20,043,780	\$28,619,700	NO
2013	\$8,575,920	\$20,752,300	\$29,328,220	NO
2012	\$9,290,580	\$20,205,300	\$29,495,880	NO
2011	\$8,575,920	\$18,061,410	\$26,637,330	NO
2010	\$8,575,920	\$16,770,390	\$25,346,310	NO
2009	\$11,434,560	\$24,117,190	\$35,551,750	NO
2008	\$11,434,560	\$30,291,600	\$41,726,160	NO
2007	\$8,575,920	\$32,254,000	\$40,829,920	NO
2006	\$5,717,280	\$27,949,310	\$33,666,590	NO
2005	\$5,717,000	\$21,616,200	\$27,333,200	NO
2004	\$4,288,045	\$17,996,005	\$22,284,050	NO
2003	\$4,288,045	\$18,206,975	\$22,495,020	NO
2002	\$5,002,430	\$20,119,555	\$25,121,985	NO
2001	\$5,002,430	\$17,043,290	\$22,045,720	NO
2000	\$3,287,910	\$14,906,905	\$18,194,815	NO

Source: Fairfax County Department  
of Tax Administration, Real Estate Division.

# **Tab F:**

RESNET Rater Certification (MANDATORY)

### RESNET Rater Certification of Development Plans

Deal Name \_\_\_\_\_

Deal Address \_\_\_\_\_

I certify that the development's plans and specifications incorporate all items for the required baseline energy performance as indicated in Virginia's Qualified Allocation Plan (QAP). In the event the plans and specifications do not include requirements to meet the QAP baseline energy performance, then those requirements still must be met, even though the application is accepted for credits.

**\*\*\* Please note that this may cause the Application to be ineligible for credits.**

**The Requirements apply to any new, adaptive reuse or rehabilitated development (including those serving elderly and/or physically disabled households).**

#### In addition provide HERS rating documentation as specified in the manual

\_\_\_\_\_ **New Construction** – EnergyStar Certification

The development's design meets the criteria for the EnergyStar certification. Rater understands that before issuance of IRS Form 8609, applicant will obtain and provide EnergyStar Certification to Virginia Housing.

\_\_\_\_\_ **Rehabilitation** – 30% performance increase over existing, based on HERS Index;

**Or Must evidence a HERS Index of 80 or better**

Rater understands that before issuance of IRS Form 8609, rater must provide Certification to Virginia Housing of energy performance.

\_\_\_\_\_ **Adaptive Reuse** – Must evidence a HERS Index of 95 or better.

Rater understands that before issuance of IRS Form 8609, rater must provide Certification to Virginia Housing of energy performance.

#### Additional Optional Certifications

I certify that the development's plans and specifications incorporate all items for the certification as indicated below, and I am a certified verifier of said certification. In the event the plans and specifications do not include requirements to obtain the certification, then those requirements still must be met, even though the application is accepted for credits. Rater understands that before issuance of IRS Form 8609, applicant will obtain and provide Certification to Virginia Housing.

\_\_\_\_\_ **Earthcraft Certification** – The development's design meets the criteria to obtain Viridian's EarthCraft Multifamily program Gold certification or higher.

\_\_\_\_\_ **LEED Certification** – The development's design meets the criteria for the U.S. Green Building Council LEED green building certification.



## Appendices continued

### Additional Optional Certifications continued

\_\_\_\_\_ **National Green Building Standard (NGBS)** – The development's design meets the criteria for meeting the NGBS Silver or higher standards to obtain certification.

\_\_\_\_\_ **Enterprise Green Communities** – The development's design meets the criteria for meeting the requirements as stated in the Enterprise Green Communities Criteria for this development's construction type to obtain certification.

**\*\*\* Please note Raters must have completed 500+ ratings in order to certify this form.**

Printed Name Stacey Smith 12/8/23  
RESNET Rater Date

Signature 

Resnet Provider Agency \_\_\_\_\_

Signature 

Provider Contact & Phone/Email \_\_\_\_\_  
\_\_\_\_\_

## 2023 Pre-Review Comments

### *Somos Phase B*



#### Project Address

1750 Old Meadow Road  
McLean, VA 22102

#### Project Summary

Somos Phase B is a 8 story, new construction multifamily development, comprised of 225 units and located in McLean, VA. SCG Development plans to construct the project using 4% LIHTC funding. As part of their funding application the project is seeking the following certification(s): ENERGY STAR Multifamily New Construction v1.1, EarthCraft v6.5 Gold, Zero Energy Ready. Steve Saville of DCS is the primary architect contact for the project.

ENERGY STAR Multifamily New Construction v1.1 requires the project to have a maximum HERS index in compliance with the ENERGY STAR floating target HERS index and completion of all required ENERGY STAR checklists. EarthCraft v6.5 Gold requires the project to have a maximum HERS index of 70. This level of certification requires the project

#### Unit Level Summary

Unit-level models were generated using Ekotrope v4.1.0 based on the proposed scope and plans provided by the project team dated December 9, 2022 .

The information used to generate the energy models is found on the following pages. If any information does not accurately reflect the project scope, please reach out to me.

Sincerely,



Lauren Thomson  
Project Manager, Viridiant

# 2023 Pre-Review Comments

## *The Highlands*



### Project Address

1750 Old Meadow Road, McLean VA

### Funding Type

4% LIHTC

### HERS Score:

63

### Required HERS Score:

67

### Modeling Summary

#### Enclosure:

- R-10 slab edge insulation, 2' depth
- R-21 Grade II cavity insulation + R-7.5 insulated sheathing, 2x6 16 O.C. metal studs in exterior above grade walls and rim & band exterior insulation
- R-13 Grade II cavity insulation in party walls and adiabatic ceilings/floors
- R-30 Continuous roof deck insulation
- 0.21 U-Value for opaque doors
- 0.30 U-Value/0.40 SHGC windows

#### Mechanicals:

- SEER2 15.2, HSPF2 7.8 air source heat pump, programmable thermostat
- 0.92 UEF storage electric water heaters, 40 gallon
- 5 ACH50 for infiltration threshold/blower door test
- 4% duct leakage to the outside, 8% total duct leakage
- Ducts within conditioned space and insulated to R-6
- DOAS providing fresh air. Assumed 1:1 ratio of cfm to wattage  
Assumed 50 cfm 1BR, 60 cfm 2BR, 75 cfm 3BR

#### Lights & Appliances:

- ENERGY STAR rated kitchen appliances
  - 640 kWh/yr refrigerator
  - 270 kWh/yr dishwasher
- Advanced lighting 100% LED



Project Name:  
Construction Type:  
Energy Efficiency Path:

Somos Phase B  
New Construction  
ENERGY STAR

Unit Type	Quantity	HERS	ENERGY STAR Target
Studio L2-8	7	63	66
1BR-C (1BR-A, 1BR-E) L2-8	40	63	67
2BR-A (2BR-B, E, I, L) L1	7	59	61
2BR-F L1	2	59	62
2BR-N L7-8	2	60	67
2BR-F (2BR-G, H) L2-8	27	56	64
2BR-A (2BR-B, C, D, E, K, L, M, I) L2-8	114	58	66
3BR L2-8	26	57	66
Projected Project HERS - Weighted Average		59	

# Home Energy Rating Certificate

Projected Report  
Based on Plans

Rating Date: 2023-02-28

Registry ID:

Ekotrope ID: dG55YpO2

## HERS® Index Score:

# 63

Your home's HERS score is a relative performance score. The lower the number, the more energy efficient the home. To learn more, visit [www.hersindex.com](http://www.hersindex.com)

## Annual Savings\*

# \$624

\*Relative to an average U.S. home

## Home:

1750 Old Meadow Road  
McLean, VA 22102

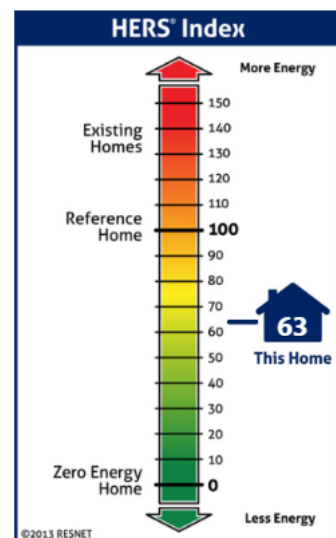
## Builder:

## Your Home's Estimated Energy Use:

	Use [MBtu]
Heating	3.7
Cooling	1.7
Hot Water	4.5
Lights/Appliances	10.9
Service Charges	
Generation (e.g. Solar)	0.0
<b>Total:</b>	<b>20.7</b>

## This home meets or exceeds the criteria of the following:

ENERGY STAR MF v1.1  
ENERGY STAR MF v1.0



## Home Feature Summary:

Home Type:	Apartment, inside unit
Model:	N/A
Community:	N/A
Conditioned Floor Area:	665 ft <sup>2</sup>
Number of Bedrooms:	1
Primary Heating System:	Air Source Heat Pump • Electric • 7.8 HSPF2
Primary Cooling System:	Air Source Heat Pump • Electric • 15.2 SEER2
Primary Water Heating:	Residential Water Heater • Electric • 0.92 UEF
House Tightness:	5 ACH50 (Adjusted Infiltration: 1.98 ACH50)
Ventilation:	50 CFM • 50 Watts • Supply Only
Duct Leakage to Outside:	4 CFM @ 25Pa (0.6 / 100 ft <sup>2</sup> )
Above Grade Walls:	R-27
Ceiling:	Vaulted Roof, R-30
Window Type:	U-Value: 0.3, SHGC: 0.27
Foundation Walls:	N/A
Framed Floor:	R-13

## Rating Completed by:

**Energy Rater:** Stacey Smith  
RESNET ID: 2279319

**Rating Company:** Viridian  
1431 W. Main Street, Richmond, VA 23220

**Rating Provider:** Viridian  
1431 W. Main Street, Richmond, VA 23220

Stacey Smith, Certified Energy Rater  
Digitally signed: 12/7/23 at 5:57 PM



# Home Energy Rating Certificate

Projected Report  
Based on Plans

Rating Date: 2023-02-28

Registry ID:

Ekotrope ID: dWPoRnpv

## HERS® Index Score:

# 59

Your home's HERS score is a relative performance score. The lower the number, the more energy efficient the home. To learn more, visit [www.hersindex.com](http://www.hersindex.com)

## Annual Savings\*

# \$901

\*Relative to an average U.S. home

## Home:

1750 Old Meadow Road  
McLean, VA 22102

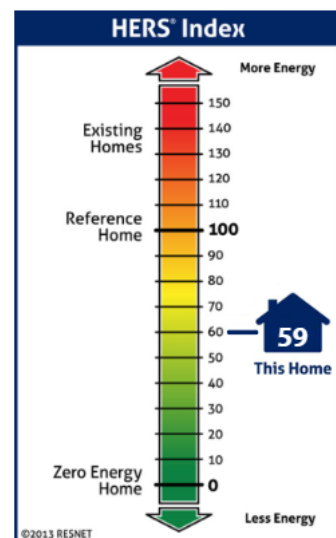
## Builder:

## Your Home's Estimated Energy Use:

	Use [MBtu]
Heating	5.8
Cooling	2.2
Hot Water	6.1
Lights/Appliances	13.1
Service Charges	
Generation (e.g. Solar)	0.0
<b>Total:</b>	<b>27.1</b>

## This home meets or exceeds the criteria of the following:

ENERGY STAR MF v1.1  
ENERGY STAR MF v1.0



## Home Feature Summary:

Home Type:	Apartment, end unit
Model:	N/A
Community:	N/A
Conditioned Floor Area:	985 ft <sup>2</sup>
Number of Bedrooms:	2
Primary Heating System:	Air Source Heat Pump • Electric • 7.8 HSPF2
Primary Cooling System:	Air Source Heat Pump • Electric • 15.2 SEER2
Primary Water Heating:	Residential Water Heater • Electric • 0.92 UEF
House Tightness:	5 ACH50 (Adjusted Infiltration: 2.63 ACH50)
Ventilation:	60 CFM • 60 Watts • Supply Only
Duct Leakage to Outside:	4 CFM @ 25Pa (0.41 / 100 ft <sup>2</sup> )
Above Grade Walls:	R-27
Ceiling:	Adiabatic, R-13
Window Type:	U-Value: 0.3, SHGC: 0.27
Foundation Walls:	N/A
Framed Floor:	N/A

## Rating Completed by:

**Energy Rater:** Stacey Smith  
RESNET ID: 2279319

**Rating Company:** Viridian  
1431 W. Main Street, Richmond, VA 23220

**Rating Provider:** Viridian  
1431 W. Main Street, Richmond, VA 23220

Stacey Smith, Certified Energy Rater  
Digitally signed: 12/7/23 at 5:57 PM



# Home Energy Rating Certificate

Projected Report  
Based on Plans

Rating Date: 2023-02-28

Registry ID:

Ekotrope ID: 2RMMYMkv

## HERS® Index Score:

# 58

Your home's HERS score is a relative performance score. The lower the number, the more energy efficient the home. To learn more, visit [www.hersindex.com](http://www.hersindex.com)

## Annual Savings\*

# \$859

\*Relative to an average U.S. home

## Home:

1750 Old Meadow Road  
McLean, VA 22102

## Builder:

## Your Home's Estimated Energy Use:

	Use [MBtu]
Heating	4.2
Cooling	2.0
Hot Water	6.1
Lights/Appliances	13.0
Service Charges	
Generation (e.g. Solar)	0.0
<b>Total:</b>	<b>25.2</b>

## This home meets or exceeds the criteria of the following:

ENERGY STAR MF v1.1

ENERGY STAR MF v1.0

## Rating Completed by:

**Energy Rater:** Stacey Smith

RESNET ID: 2279319

**Rating Company:** Viridian

1431 W. Main Street, Richmond, VA 23220

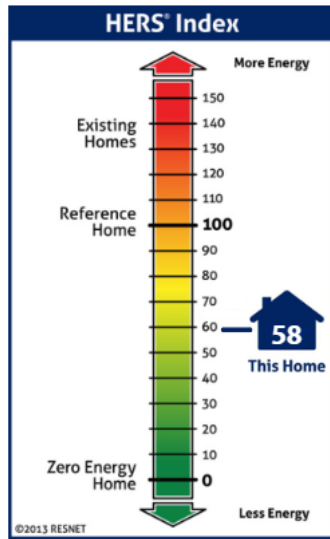
**Rating Provider:** Viridian

1431 W. Main Street, Richmond, VA 23220



Stacey Smith, Certified Energy Rater

Digitally signed: 12/7/23 at 5:57 PM



## Home Feature Summary:

Home Type:	Apartment, inside unit
Model:	N/A
Community:	N/A
Conditioned Floor Area:	955 ft <sup>2</sup>
Number of Bedrooms:	2
Primary Heating System:	Air Source Heat Pump • Electric • 7.8 HSPF2
Primary Cooling System:	Air Source Heat Pump • Electric • 15.2 SEER2
Primary Water Heating:	Residential Water Heater • Electric • 0.92 UEF
House Tightness:	5 ACH50 (Adjusted Infiltration: 1.13 ACH50)
Ventilation:	60 CFM • 60 Watts • Supply Only
Duct Leakage to Outside:	4 CFM @ 25Pa (0.42 / 100 ft <sup>2</sup> )
Above Grade Walls:	R-27
Ceiling:	Adiabatic, R-31
Window Type:	U-Value: 0.3, SHGC: 0.27
Foundation Walls:	N/A
Framed Floor:	R-13



Ekotrope RATER - Version:4.1.0.3292

The Energy Rating Disclosure for this home is available from the Approved Rating Provider.

This report does not constitute any warranty or guarantee.

# Home Energy Rating Certificate

Projected Report  
Based on Plans

Rating Date: 2023-02-28

Registry ID:

Ekotrope ID: 2JoVY3oL

## HERS® Index Score:

# 56

Your home's HERS score is a relative performance score. The lower the number, the more energy efficient the home. To learn more, visit [www.hersindex.com](http://www.hersindex.com)

## Annual Savings\*

# \$976

\*Relative to an average U.S. home

## Home:

1750 Old Meadow Road  
McLean, VA 22102

## Builder:

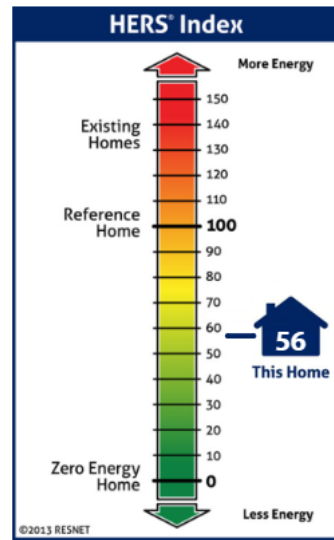
## Your Home's Estimated Energy Use:

	Use [MBtu]
Heating	4.4
Cooling	2.5
Hot Water	6.0
Lights/Appliances	13.6
Service Charges	
Generation (e.g. Solar)	0.0
<b>Total:</b>	<b>26.5</b>

## This home meets or exceeds the criteria of the following:

ENERGY STAR MF v1.1

ENERGY STAR MF v1.0



## Home Feature Summary:

Home Type:	Apartment, end unit
Model:	N/A
Community:	N/A
Conditioned Floor Area:	1,125 ft <sup>2</sup>
Number of Bedrooms:	2
Primary Heating System:	Air Source Heat Pump • Electric • 7.8 HSPF2
Primary Cooling System:	Air Source Heat Pump • Electric • 15.2 SEER2
Primary Water Heating:	Residential Water Heater • Electric • 0.92 UEF
House Tightness:	5 ACH50 (Adjusted Infiltration: 1.14 ACH50)
Ventilation:	60 CFM • 60 Watts • Supply Only
Duct Leakage to Outside:	4 CFM @ 25Pa (0.36 / 100 ft <sup>2</sup> )
Above Grade Walls:	R-27
Ceiling:	Adiabatic, R-31
Window Type:	U-Value: 0.3, SHGC: 0.27
Foundation Walls:	N/A
Framed Floor:	R-13

## Rating Completed by:

**Energy Rater:** Stacey Smith

RESNET ID: 2279319

**Rating Company:** Viridian

1431 W. Main Street, Richmond, VA 23220

**Rating Provider:** Viridian

1431 W. Main Street, Richmond, VA 23220

Stacey Smith, Certified Energy Rater

Digitally signed: 12/7/23 at 5:57 PM



Ekotrope RATER - Version:4.1.0.3292

The Energy Rating Disclosure for this home is available from the Approved Rating Provider.

This report does not constitute any warranty or guarantee.



# Home Energy Rating Certificate

Projected Report  
Based on Plans

Rating Date: 2023-02-28

Registry ID:

Ekotrope ID: vg0Q6Xz2

## HERS® Index Score:

# 59

Your home's HERS score is a relative performance score. The lower the number, the more energy efficient the home. To learn more, visit [www.hersindex.com](http://www.hersindex.com)

## Annual Savings\*

# \$1,007

\*Relative to an average U.S. home

## Home:

1750 Old Meadow Road  
McLean, VA 22102

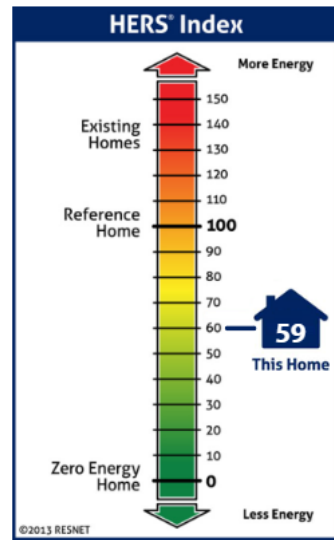
## Builder:

## Your Home's Estimated Energy Use:

	Use [MBtu]
Heating	7.7
Cooling	2.6
Hot Water	6.0
Lights/Appliances	13.7
Service Charges	
Generation (e.g. Solar)	0.0
<b>Total:</b>	<b>30.0</b>

## This home meets or exceeds the criteria of the following:

ENERGY STAR MF v1.1  
ENERGY STAR MF v1.0



## Home Feature Summary:

Home Type:	Apartment, end unit
Model:	N/A
Community:	N/A
Conditioned Floor Area:	1,141 ft <sup>2</sup>
Number of Bedrooms:	2
Primary Heating System:	Air Source Heat Pump • Electric • 7.8 HSPF2
Primary Cooling System:	Air Source Heat Pump • Electric • 15.2 SEER2
Primary Water Heating:	Residential Water Heater • Electric • 0.92 UEF
House Tightness:	5 ACH50 (Adjusted Infiltration: 2.65 ACH50)
Ventilation:	60 CFM • 60 Watts • Supply Only
Duct Leakage to Outside:	4 CFM @ 25Pa (0.35 / 100 ft <sup>2</sup> )
Above Grade Walls:	R-27
Ceiling:	Adiabatic, R-13
Window Type:	U-Value: 0.3, SHGC: 0.27
Foundation Walls:	N/A
Framed Floor:	N/A

## Rating Completed by:

**Energy Rater:** Stacey Smith

RESNET ID: 2279319

**Rating Company:** Viridian

1431 W. Main Street, Richmond, VA 23220

**Rating Provider:** Viridian

1431 W. Main Street, Richmond, VA 23220

Stacey Smith, Certified Energy Rater

Digitally signed: 12/7/23 at 5:57 PM



# Home Energy Rating Certificate

Projected Report  
Based on Plans

Rating Date: 2023-02-28

Registry ID:

Ekotrope ID: 2JoonyGL

## HERS® Index Score:

# 60

Your home's HERS score is a relative performance score. The lower the number, the more energy efficient the home. To learn more, visit [www.hersindex.com](http://www.hersindex.com)

## Annual Savings\*

# \$740

\*Relative to an average U.S. home

## Home:

1750 Old Meadow Road  
McLean, VA 22102

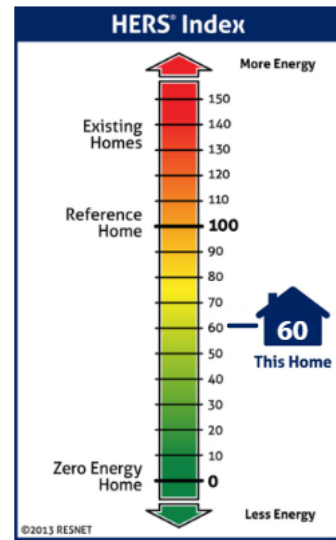
## Builder:

## Your Home's Estimated Energy Use:

	Use [MBtu]
Heating	3.0
Cooling	1.6
Hot Water	5.9
Lights/Appliances	12.6
Service Charges	
Generation (e.g. Solar)	0.0
<b>Total:</b>	<b>23.1</b>

## This home meets or exceeds the criteria of the following:

ENERGY STAR MF v1.1  
ENERGY STAR MF v1.0



## Home Feature Summary:

Home Type:	Apartment, inside unit
Model:	N/A
Community:	N/A
Conditioned Floor Area:	857 ft <sup>2</sup>
Number of Bedrooms:	2
Primary Heating System:	Air Source Heat Pump • Electric • 7.8 HSPF2
Primary Cooling System:	Air Source Heat Pump • Electric • 15.2 SEER2
Primary Water Heating:	Residential Water Heater • Electric • 0.92 UEF
House Tightness:	5 ACH50 (Adjusted Infiltration: 0.43 ACH50)
Ventilation:	60 CFM • 60 Watts • Supply Only
Duct Leakage to Outside:	4 CFM @ 25Pa (0.47 / 100 ft <sup>2</sup> )
Above Grade Walls:	R-27
Ceiling:	Adiabatic, R-31
Window Type:	U-Value: 0.3, SHGC: 0.27
Foundation Walls:	N/A
Framed Floor:	R-13

## Rating Completed by:

**Energy Rater:** Stacey Smith  
RESNET ID: 2279319

**Rating Company:** Viridian  
1431 W. Main Street, Richmond, VA 23220

**Rating Provider:** Viridian  
1431 W. Main Street, Richmond, VA 23220

  
Stacey Smith, Certified Energy Rater  
Digitally signed: 12/7/23 at 5:57 PM



# Home Energy Rating Certificate

Projected Report  
Based on Plans

Rating Date: 2023-02-28

Registry ID:

Ekotrope ID: 26rrDrW2

## HERS® Index Score:

# 57

Your home's HERS score is a relative performance score. The lower the number, the more energy efficient the home. To learn more, visit [www.hersindex.com](http://www.hersindex.com)

## Annual Savings\*

# \$1,070

\*Relative to an average U.S. home

## Home:

1750 Old Meadow Road  
McLean, VA 22102

## Builder:

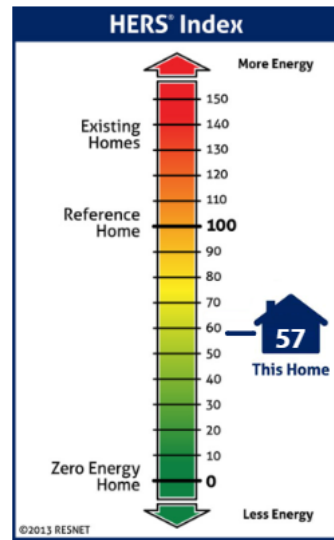
## Your Home's Estimated Energy Use:

	Use [MBtu]
Heating	5.5
Cooling	2.7
Hot Water	7.2
Lights/Appliances	15.5
Service Charges	
Generation (e.g. Solar)	0.0
<b>Total:</b>	<b>30.9</b>

## This home meets or exceeds the criteria of the following:

ENERGY STAR MF v1.1

ENERGY STAR MF v1.0



## Home Feature Summary:

Home Type:	Apartment, end unit
Model:	N/A
Community:	N/A
Conditioned Floor Area:	1,316 ft <sup>2</sup>
Number of Bedrooms:	3
Primary Heating System:	Air Source Heat Pump • Electric • 7.8 HSPF2
Primary Cooling System:	Air Source Heat Pump • Electric • 15.2 SEER2
Primary Water Heating:	Residential Water Heater • Electric • 0.92 UEF
House Tightness:	5 ACH50 (Adjusted Infiltration: 1.03 ACH50)
Ventilation:	75 CFM • 75 Watts • Supply Only
Duct Leakage to Outside:	4 CFM @ 25Pa (0.3 / 100 ft <sup>2</sup> )
Above Grade Walls:	R-27
Ceiling:	Adiabatic, R-31
Window Type:	U-Value: 0.3, SHGC: 0.27
Foundation Walls:	N/A
Framed Floor:	R-13

## Rating Completed by:

**Energy Rater:** Stacey Smith

RESNET ID: 2279319

**Rating Company:** Viridian

1431 W. Main Street, Richmond, VA 23220

**Rating Provider:** Viridian

1431 W. Main Street, Richmond, VA 23220

Stacey Smith, Certified Energy Rater

Digitally signed: 12/7/23 at 5:57 PM



Ekotrope RATER - Version:4.1.0.3292

The Energy Rating Disclosure for this home is available from the Approved Rating Provider.

This report does not constitute any warranty or guarantee.

# Home Energy Rating Certificate

Projected Report  
Based on Plans

Rating Date: 2023-02-28

Registry ID:

Ekotrope ID: dq3Mqbn2

## HERS® Index Score:

# 63

Your home's HERS score is a relative performance score. The lower the number, the more energy efficient the home. To learn more, visit [www.hersindex.com](http://www.hersindex.com)

## Annual Savings\*

# \$542

\*Relative to an average U.S. home

## Home:

1750 Old Meadow Road  
McLean, VA 22102

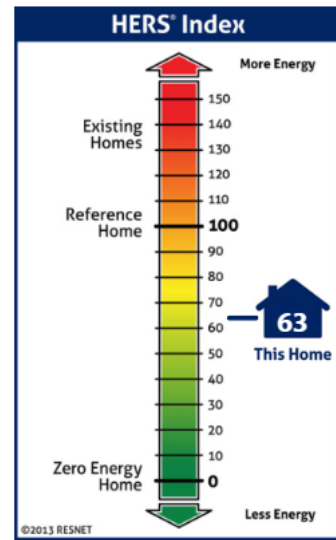
## Builder:

## Your Home's Estimated Energy Use:

	Use [MBtu]
Heating	2.5
Cooling	1.2
Hot Water	4.7
Lights/Appliances	10.3
Service Charges	
Generation (e.g. Solar)	0.0
<b>Total:</b>	<b>18.8</b>

## This home meets or exceeds the criteria of the following:

ENERGY STAR MF v1.1  
ENERGY STAR MF v1.0



## Home Feature Summary:

Home Type:	Apartment, end unit
Model:	N/A
Community:	N/A
Conditioned Floor Area:	524 ft <sup>2</sup>
Number of Bedrooms:	1
Primary Heating System:	Air Source Heat Pump • Electric • 7.8 HSPF2
Primary Cooling System:	Air Source Heat Pump • Electric • 15.2 SEER2
Primary Water Heating:	Residential Water Heater • Electric • 0.92 UEF
House Tightness:	5 ACH50 (Adjusted Infiltration: 0.62 ACH50)
Ventilation:	50 CFM • 50 Watts • Supply Only
Duct Leakage to Outside:	4 CFM @ 25Pa (0.76 / 100 ft <sup>2</sup> )
Above Grade Walls:	R-27
Ceiling:	Adiabatic, R-31
Window Type:	U-Value: 0.3, SHGC: 0.27
Foundation Walls:	N/A
Framed Floor:	R-13

## Rating Completed by:

**Energy Rater:** Stacey Smith  
RESNET ID: 2279319

**Rating Company:** Viridian  
1431 W. Main Street, Richmond, VA 23220

**Rating Provider:** Viridian  
1431 W. Main Street, Richmond, VA 23220

  
Stacey Smith, Certified Energy Rater  
Digitally signed: 12/7/23 at 5:57 PM



# **Tab G:**

Zoning Certification Letter (MANDATORY)

01.02.2024

Virginia Housing  
601 South Belvidere Street  
Richmond, Virginia 23220  
Attention: JD Bondurant

**RE: Zoning Certification**  
**Name of Development – Somos Phase B**  
**Name of Owner/Applicant – Somos Phase B, LLC**  
**Name of Current Owner – Fairfax County Redevelopment and Housing Authority**  
**VIKA Virginia #VV7543.F**

To Whom it May Concern,

The above-referenced Owner/Applicant has asked this office to complete this form letter regarding the zoning of the proposed Development (more fully described below). This certification is rendered solely for the purpose of confirming proper zoning for the site of the Development. It is understood that this letter will be used by the Virginia Housing Department Authority solely for the purpose of determining whether the Development qualifies for points available under VHDA's Qualified Allocation Plan for housing tax credits.

**Development Description:**

Development Address:  
1750 Old Meadow Road  
Tysons, VA  
22102  
Tax Map Reference 29-4 ((6)) 100A

Legal Description:

All that certain lot or parcel of land situate and lying in Fairfax County, Virginia, and more particularly described as follows: Lot 100, Section 1 of the subdivision of Westgate Research Park, as the same is duly dedicated, platted and recorded in deed book 2782 at page 615, among the land records of Fairfax County, Virginia. And being the same property being conveyed by deed dated August 10, 2018, recorded August 10, 2018, in deed book 25506 at page 1247.

Proposed Improvements:

<input checked="" type="checkbox"/> New Construction:	<u>225</u> # Units	<u>1</u> # Buildings	<u>264,475.18</u> Approx. Total Floor Area Sq. Ft.
<input type="checkbox"/> Adaptive Reuse:	<u>      </u> # Units	<u>      </u> # Buildings	<u>      </u> Approx. Total Floor Area Sq. Ft.
<input type="checkbox"/> Rehabilitation:	<u>      </u> # Units	<u>      </u> # Buildings	<u>      </u> Approx. Total Floor Area Sq. Ft.

Current Zoning:

PTC Planned Tysons Corner Urban District allowing a density of (see attached excerpt) units per acre, and the following other applicable conditions: The property is subject to the proffered and development conditions as well as the development plan associated with Rezoning Application and Final Development Plan RZ/FDP 2021-PR-00022. The associated development plan allows for a range of 400 to 460 dwelling units for the entire development.

Other Descriptive Information:

The above-referenced Rezoning Application and Final Development Plan contemplated potential phased development and the Site Plan prepared for development of this site includes full buildout subject to this Rezoning Application and Final Development Plan.

01.02.2024

**Zoning Certification**

**Somos Phase B**

Page 2 of 2

**Local Certification:**

Check one of the following as appropriate:

☒ The zoning for the proposed development described above is proper for the proposed residential development. To the best of my knowledge (relying on certification from Fairfax County regarding full buildout development of the site, dated February 17, 2023, and visual review of existing site conditions), there are presently no zoning violations outstanding on this property. No further zoning approvals by the Fairfax County Board of Supervisors and/or special use permits are required.

☐ The development described above is an approved non-conforming use. To the best of my knowledge, there are presently no zoning violations outstanding on this property. No further zoning approvals and/or special use permits are required.

  
Signature

Stephen Crowell  
Printed Name

Member/Vice President  
Title of Local Official or Civil Engineer

703-761-2796  
Phone

December 29, 2023  
Date

**Attachments:**

- Zoning Certification from Fairfax County (Dated 2/17/23)
- Fairfax County Zoning Ordinance Excerpt (2105.6 PTC Planned Tysons Corner Urban District)

Q:\Projects\7543\7543F\DATA\Letter\2023-12-29 Zoning Certification.docx





# ATTACHMENT 1



## County of Fairfax, Virginia

To protect and enrich the quality of life for the people, neighborhoods and diverse communities of Fairfax County

### Zoning Certification

**DATE:** February 17, 2023

**TO:** Virginia Housing  
601 South Belvidere Street  
Richmond, Virginia 23220  
Attention: JD Bondurant

**RE:** ZONING CERTIFICATION  
Name of Development: Somos Phase B-9  
Name of Owner/Applicant: Somos Phase B-9, LLC  
Name of Seller/Current Owner: Fairfax County Redevelopment and Housing Authority (FCRHA)

The above-referenced Owner/Applicant has asked this office to complete this form letter regarding the zoning of the proposed Development (more fully described below). This certification is rendered solely for the purpose of confirming proper zoning for the site of the Development. It is understood that this letter will be used by Virginia Housing solely for the purpose of determining whether the Development qualifies for credits available under Virginia Housing's Qualified Allocation Plan.

#### DEVELOPMENT DESCRIPTION:

Development Address: Property address: 1750 Old Meadow Road, Tysons, VA 22102; Tax Map Ref. 29-4 ((6)) 100A.

Legal Description: (Provided by applicant) All that certain lot or parcel of land situate and lying in Fairfax County, Virginia, and more particularly described as follows: Lot 100, Section 1 of the subdivision of Westgate Research Park, as the same is duly dedicated, platted and recorded in deed book 2782 at page 615, among the land records of Fairfax County, Virginia. And being the same property being conveyed by deed dated August 10, 2018, recorded August 10, 2018, in deed book 25506 at page 1247.

Proposed Improvements:

- ☒ New Construction: 460 # Units 2 # Buildings 441,984 Approx. Total Floor Area Sq. Ft.  
☐ Adaptive Reuse:      # Units      # Buildings          Approx. Total Floor Area Sq. Ft.  
☐ Rehabilitation:      # Units      # Buildings          Approx. Total Floor Area Sq. Ft.



**Department of Planning & Development**  
Zoning Administration Division  
Ordinance Administration Branch  
12055 Government Center Parkway, Suite 807  
Fairfax, Virginia 22035-5505  
Phone 703-324-1314 FAX 703-803-6372  
[www.fairfaxcounty.gov/planning-development/](http://www.fairfaxcounty.gov/planning-development/)



Current Zoning: PTC Planned Tysons Corner Urban District,<sup>1</sup> allowing a density of (see below) units per acre, and the following other applicable condition: The property is subject to the proffered and development conditions as well as the development plan associated with Rezoning Application and Final Development Plan RZ/FDP 2021-PR-00022.<sup>2</sup> The associated development plan allows for a range of 400 to 460 dwelling units.

Other Descriptive Information:

---

---

**LOCAL CERTIFICATION:**

Check one of the following as appropriate:

- ☒ The zoning for the proposed development described above is proper for the proposed residential development. To the best of my knowledge, there are presently no zoning violations outstanding on this property. No further zoning approvals and/or special use permits are required.
- ☐ The development described above is an approved non-conforming use. To the best of my knowledge, there are presently no zoning violations outstanding on this property. No further zoning approvals and/or special use permits are required.

February 17, 2023

Date

Sara Morgan

Signature

Sara Morgan

Printed Name

Senior Planner

Title of Local Official or Civil Engineer

(703)324-1314

Phone

Cc: Fairfax County Redevelopment and Housing Authority, 3700 Pender Drive, Suite 300, Fairfax, VA 22035 (property owner)

---

<sup>1</sup> <https://online.encodeplus.com/regs/fairfaxcounty-va/doc-viewer.aspx?secid=517>

<sup>2</sup> <https://plus.fairfaxcounty.gov/CitizenAccess/Cap/CapDetail.aspx?Module=Zoning&TabName=Zoning&capID1=REC21&capID2=00000&capID3=003V1&agencyCode=FFX&IsToShowInspection=> ;  
<https://plus.fairfaxcounty.gov/CitizenAccess/Cap/CapDetail.aspx?Module=Zoning&TabName=Zoning&capID1=REC21&capID2=00000&capID3=005OK&agencyCode=FFX&IsToShowInspection=>

## 6. PTC Planned Tysons Corner Urban District

### A. Purpose

The PTC District is established for the Tysons Urban Center as defined in the Comprehensive Plan to implement the mix of uses, densities, and intensities under the redevelopment option set forth in the Comprehensive Plan. The PTC District regulations provide flexibility to transform the designated Tysons Urban Center area from a suburban office park and activity center into an urban, mixed-use, transit, bicycle, and pedestrian oriented community. The regulations also promote high standards in urban design, layout, and construction.

To create mixed-use downtowns near mass transit, higher development intensities are to occur within approximately one-half mile of the four Metrorail Station entrances, identified as Transit Oriented Development (TOD) Districts in the Comprehensive Plan. The remaining areas, the Non-Transit Oriented Development (Non-TOD) Districts, are to be developed into lively urban neighborhoods that include an appropriate mix of uses, densities, and intensities compatible to adjacent communities. In both TOD and Non-TOD Districts, development should be designed in an integrated manner that will enhance the urban character. Smaller, freestanding structures are generally discouraged – however, when the proposed use is designed in an urban form that creates or enhances an appropriate street edge and implements the stated purpose and intent of the district, the proposed use will be considered.

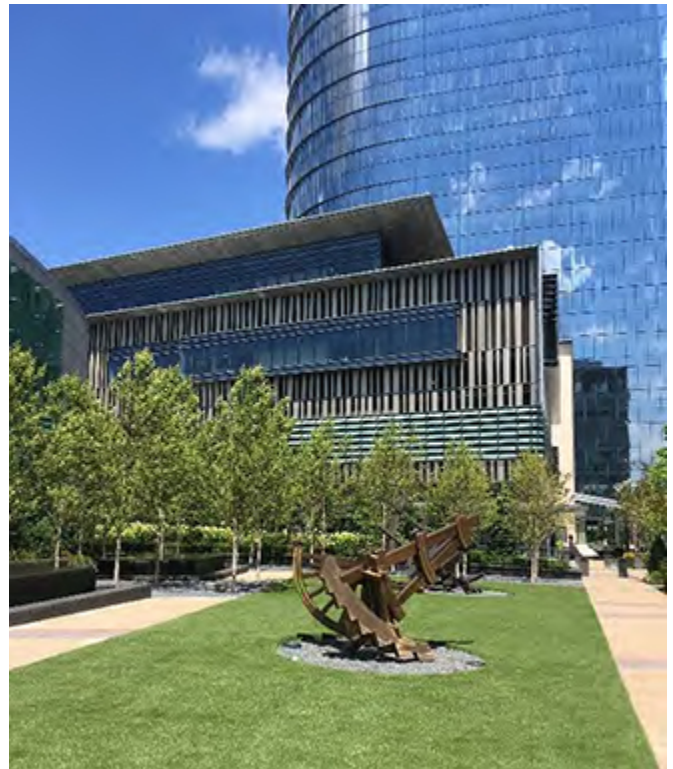
To be granted this zoning district, the applicant must demonstrate that the development furthers the vision of the Tysons Urban Center, as identified in the Comprehensive Plan, by meeting the following minimum objectives:

- (1) Contribute to a tiered intensity of development having the highest intensities located closest to the transit stations and providing the mix of residential, office and commercial uses necessary to achieve a vibrant, urban environment.
- (2) Contribute to the network of open space and urban parks, to include stream valley parks, pocket parks, common greens, civic plazas, and athletic fields for the workers and residents of Tysons.
- (3) Promote environmental stewardship by implementing green building design; use efficient, renewable, and sustainable energy practices; incorporate low impact development strategies, such as innovative stormwater management and green roofs; and achieve the tree canopy goals for Tysons.
- (4) Further the implementation of the urban grid of streets and the described street hierarchy for Tysons.
- (5) Reduce the amount of single occupant vehicle trips by limiting the amount of provided parking, encouraging shared parking arrangements among uses, permitting the inclusion of managed tandem parking spaces, and implementing various Transportation Demand Management strategies, such as transit subsidies, carpool and vanpool services, employee shuttles, car-sharing programs, and bicycle accommodations.
- (6) Contribute to the necessary public facilities to support the projected job and population growth, including schools, fire and police services, a library, public utilities, and an arts center.
- (7) Contribute to the specified streetscape and apply the urban design guidelines specified for build-to lines, building articulation, fenestration, ground floor transparency, and parking design to create an integrated urban, pedestrian-friendly environment.
- (8) Contribute to implementing the workforce and affordable housing policies for Tysons to provide housing to various income levels.

The Board will only consider those development proposals within the Tysons Urban Center that are submitted with a rezoning application and that use the redevelopment option as set forth in the Comprehensive Plan. A rezoning to and development under this district will be permitted only in accordance with development plans prepared and approved in accordance with this Part and the provisions of subsection 8100.2.E.



Figure 2105.5: PTC District Aerial Example



## **B. PTC Lot and Building Dimensional Standards**

### **(1) District Size**

The minimum PTC District size is ten acres. This minimum size may be waived by the Board if the development proposal is in conformance with the Comprehensive Plan.

### **(2) Floor Area Ratio**

**(a)** Maximum floor area ratio within the TOD District up to ¼ mile from a Metrorail Station entrance is as follows:

- 1. For residential and all other uses except office:** No maximum FAR when the proposed development implements the site-specific development guidelines and recommendations of the Comprehensive Plan, including design, mix of uses, and scale of the proposed development, and only when the appropriate measures are proposed or in place to adequately mitigate the anticipated transportation impacts of the proposed development.
- 2. For office uses:** 2.5 FAR, exclusive of any bonus intensity obtained for proffered public facilities or public infrastructure, as set forth in the Comprehensive Plan; the Board, however, may permit an increase in FAR in accordance with subsection c below.
- 3.** To encourage redevelopment near Metrorail Station areas at a high intensity and ensure that the impacts on the transportation network are adequately addressed, the Board may approve, in conjunction with a rezoning, a special exception to allow an increase in FAR in the PTC District for property located within the TOD District up to ¼ mile of a Metrorail Station entrance, subject to the following:
  - a.** The proposed development must facilitate transit-oriented redevelopment in furtherance of the Comprehensive Plan.
  - b.** The proposed development must achieve, to the maximum extent feasible, the vehicle trip reduction goals of the Comprehensive Plan.
  - c.** The proposed development must fully meet all applicable areawide, districtwide, and site specific recommendations of the Comprehensive Plan.
  - d.** The proposed development must exhibit excellence in urban design and building form as envisioned in the Comprehensive Plan.
  - e.** The applicant must identify each phase of the proposed development.
  - f.** The location and amount of special exception floor area will be allocated on a per building basis. To the extent possible, the floor area may be dispersed among the building shown on the SE plat. Unless good cause is shown, the total amount of the approved special exception floor area may not be allocated to a single building in a multi-building or multi-phased development or be allocated solely within the initial phases of the development. Additionally, if any building is constructed without using any or all of its assigned special exception floor area, the unused floor area will be forfeited. The unused floor area may only be transferred to another building within the development with a special exception amendment, and, if applicable, a proffered condition/conceptual development plan amendment.
  - g.** The applicant must submit the SE plat showing the location and allocation of the special exception floor area per building, and the development plan associated with the PTC District rezoning specifying the floor area per building without the special exception floor area.
  - h.** A special exception for increased floor area will automatically expire in whole or in part, without notice, 10 years from the date of approval, or a timeframe as specified by the



Board, unless the core and shell final inspection(s) has been approved for the building(s) containing the special exception floor area; or additional time is granted by the Board. If a request for additional time is filed in accordance with subsection i below, the special exception will remain valid until the request for additional time is acted upon by the Board. During this period, the special exception floor area may not be constructed.

- i.* The Board may approve a request for additional time if:
  - (1) The request is filed in writing with the Zoning Administrator before the expiration date. The request must specify the basis for the amount of additional time requested and explain why all or a portion of the approved special exception floor area has not been constructed in accordance with the timeframe specified in the approval of the special exception;
  - (2) The request must specify the amount of floor area and mix of uses currently constructed in the development; include the amount of special exception floor area constructed per building; indicate the total amount of proposed floor area including the special exception floor area per building to be constructed; identify each phase and the anticipated order of the remaining development and the anticipated completion date; establish, to the satisfaction of the Board, the continued market feasibility of the proposal; and state, in detail, how the proposal meets the recommendations set forth in the Comprehensive Plan including, but not limited to, the land use mix, the grid of streets, the amount of open space, including active recreation, parking ratios, and Transportation Demand Management achievements proffered in conjunction with the rezoning and any amendments thereto.

- (b)** Floor area ratio within the TOD District beyond ¼ mile from a Metrorail Station entrance and the Non-TOD District is as follows:
  - 1.** Maximum floor area ratio: 2.5 FAR, or as further qualified in the Comprehensive Plan. This requirement does not include the floor area for affordable and bonus market rate units provided in accordance with Section 5101; the floor area for proffered bonus market rate units or bonus floor area associated with the provision of workforce dwelling units as applicable; or any bonus density or intensity obtained for proffered public facilities or public infrastructure, all as set forth in the Comprehensive Plan.
  - 2.** For those properties within the TOD District beyond the ¼ mile and proposed for residential mixed use development as defined in the Comprehensive Plan, the FARs set forth in subsection (a) above may be applied if the applicant demonstrates to the Board's satisfaction that:
    - a.* There is acceptable pedestrian access to the Metrorail Station;
    - b.* The proposed FAR cannot be achieved with the inclusion of bonuses for affordable housing or public facilities; and
    - c.* The property is adjacent to or redeveloping in coordination with property that is located within one-fourth of a mile from a Metrorail Station entrance.
- (c)** Cellar space counts as gross floor area and is included in the calculation of FAR, except when the cellar space:
  - 1.** Has a structural headroom of less than six feet, six inches and is specifically identified for mechanical equipment;
  - 2.** Is specifically identified for storage or other uses that are accessory to the principal uses in the building;

3. Is specifically identified as a loading space, including any associated travel way providing access to the space, as well as the loading dock used for the temporary loading and unloading of goods; or
  4. Is specifically identified to house an unmanned datacenter or other similar telecommunication or electronic equipment.
- (d) The floor area for dwellings will be calculated according to the gross floor area definition, as modified above, except that the following features will not be deemed gross floor area:
1. Balconies, porches, decks, breezeways, stoops, and stairs that may be roofed but that have at least one open side; or
  2. Breezeways that may be covered but that have two open ends.
  3. For the purposes of this subsection, an open side or open end has no more than 50 percent of the total area between the side(s), roof, and floor enclosed with railings, walls, or architectural features.

**(3) Open Space**

- (a) The Board will determine the amount of on-site or off-site open space in accordance with the Comprehensive Plan recommendations for streetscape and urban park standards. Open space includes publicly accessible parks and other open space elements such as courtyards, plazas, trails, outdoor recreational facilities, landscaped rooftops, courtyards on structures, green roofs, or any rooftop recreational facilities. Not more than one-half of the publicly accessible open space may be accommodated above the street level, unless the Board modifies this requirement to accommodate active recreation facilities.
- (b) Recreational facilities must be provided in conjunction with approval of a final development plan. These facilities are subject to the provisions of subsection 8100.2.E(4); however, recreational facilities, such as swimming pools, exercise rooms, or health clubs located on rooftops, deck areas, or areas within a building may be used to fulfill this requirement. The requirement for providing recreational facilities will be based on a minimum expenditure of \$1,900 per dwelling unit for recreational facilities and either:
1. The facilities will be provided on-site by the developer in substantial conformance with the approved final development plan; or
  2. The Board may approve the provision of the facilities on land that is not part of the subject PTC District.
- (c) The per unit contribution in subsection (b) above does not apply to affordable dwelling units.

**C. Additional Standards**

**(1) Concurrent Applications**

A site plan or minor site plan may be filed concurrently with the filing of a rezoning, special exception, or special permit; however, it may not be approved until the rezoning, special exception, or special permit application has been approved by the Board. Concurrent processing will not prejudice the consideration of the application in any way.

**(2) Off-Street Parking and Loading**

- (a) A substantial portion of the required parking should be provided in above or below grade parking structures.
- (b) Additional off-street parking and loading requirements in the PTC District are included in Section 6102.

**(3) Landscaping and Screening**

The landscaping and screening requirements of Section 5108 will apply as follows:

- (a) Subsections 5108.1 through 5108.4, are applicable.
- (b) Subsection 5108.5 applies, except where streetscape standards are set forth in the Comprehensive Plan.
- (c) Subsection 5108.6 only applies at the peripheral boundary of the Tysons Urban Center, as identified in the Comprehensive Plan.

**(4) Layout**

All uses and structures must be designed in an integrated manner. Freestanding structures up to two stories in height containing one or more uses are only permitted when the applicant demonstrates that the development meets the urban design guidelines set forth in the Comprehensive Plan.

**(5) Interim Uses**

As a part of a long-term phased development proposal and to assist in maintaining the economic viability of the Tysons Urban Center, when proposed as an interim use, uses and structures that legally exist at the time of the rezoning to the PTC District may be continued, including any drive-through facility. New uses and structures may also be permitted as interim uses, even if these interim structures do not fully satisfy the urban design guidelines. All interim uses must be specifically identified on an approved conceptual development plan, subject to the following:

- (a) The phasing plan must identify the interim use or structure, the intended duration of the interim use/structure, and how the interim use/structure fits into the phasing plan. The applicant must also demonstrate that the interim use or structure will not adversely impact the ability to achieve the objectives set forth above in the Purpose of the PTC District.
- (b) For existing uses and structures, to the extent feasible, the applicant should provide the design elements set forth in the urban design guidelines of the Comprehensive Plan, such as enhanced streetscape and improvements to pedestrian and vehicular access. New uses or structures, to the extent feasible, must be designed in accordance with the urban design guidelines including streetscape, build-to lines, and building articulation.
- (c) All off-street parking, loading, and stacking spaces for existing uses must be included as a part of the parking plan in Section 6102. Existing surface parking may be retained, provided this parking is redesigned, to the extent feasible, if it achieves the following:
  - 1. Minimizes pedestrian conflicts by limiting the number of curb cuts;
  - 2. Provides clearly identified pedestrian access through the parking lot; and
  - 3. Provides appropriate interior and perimeter landscaping and screening to minimize the potential adverse impacts on adjacent property.
- (d) New interim surface parking may be provided when the standards in subsection (5)(c) above are satisfied and when this surface parking is designed to orient parking, loading, and drive aisles to the rear and side of the structure.
- (e) The Board may impose such conditions and restrictions as it deems necessary to assure that the interim use or structure will be compatible with and will not adversely impact the ability to achieve the goals and objectives set forth in the Comprehensive Plan.

**D. Reference to Other Standards**

General regulations that may supplement the regulations above:

Use regulations	Article 4
Development plan requirements	Article 8, subsection 8100.2.E



---

Site plan provisions

Article 8, subsection 8100.7

---

(Ord. 112.1-2022-5, 02/22/2022)

Effective on: 2/23/2022

# **Tab H:**

Attorney's Opinion (MANDATORY)



101 Arch Street	1325 G Street, NW
Suite 1101	Suite 770
Boston, MA 02110	Washington, DC 20005
T 617.224.0600	T 202.842.9006
F 617.224.0601	F 202.842.3936

January 25, 2024

TO: Virginia Housing  
601 South Belvidere Street  
Richmond, Virginia 23220

RE: 2024 Tax Credit Reservation Request (30% present value credits to be paired with tax-exempt bonds)

Name of Development: Somos Phase B  
Name of Owner: Somos Phase B, LLC

Dear Virginia Housing:

This undersigned firm represents the above-referenced Owner as its counsel. It has received a copy of and has reviewed the completed application package dated January 25, 2024 (of which this opinion is a part) (the “Application”) submitted to you for the purpose of requesting, in connection with the captioned Development, a reservation of low-income housing tax credits (“Credits”) available under Section 42 of the Internal Revenue Code of 1986, as amended (the “Code”). It has also reviewed Section 42 of the Code, the regulations issued pursuant thereto and such other binding authority as it believes to be applicable to the issuance hereof (the regulations and binding authority hereinafter collectively referred to as the “Regulations”).

Based upon the foregoing reviews and upon due investigation of such matters as it deems necessary in order to render this opinion, but without expressing any opinion as to either the reasonableness of the estimated or projected figures or the veracity or accuracy of the factual representations set forth in the Application, the undersigned is of the opinion that:

1. It is more likely than not that the inclusion in eligible basis of the Development of such cost items or portions thereof, as set forth in the Hard Costs and Owners Costs section of the Application form, complies with all applicable requirements of the Code and Regulations.
2. The calculations (a) of the Maximum Allowable Credit available under the Code with respect to the Development and (b) of the Estimated Qualified Basis of each building in the development comply with all applicable requirements of the Code and regulations, including the selection of credit type implicit in such calculations.
3. The information set forth in the Unit Details section of the Application form as to proposed rents satisfies all applicable requirements of the Code and Regulations.


4. The site of the captioned Development is controlled by the Owner, as identified in the Site Control section of the Application.

Finally, the undersigned is of the opinion that, if all information and representations contained in the Application and all current law were to remain unchanged, upon the placement in service of each building of the Development, the Owner would be eligible under the applicable provisions of the Code and the Regulations to an allocation of Credits in the amount(s) requested in the Application.

This opinion is rendered solely for the purpose of inducing the Virginia Housing Development Authority ("Virginia Housing") to issue a reservation of Credits to the Owner. Accordingly, it may be relied upon only by Virginia Housing and may not be relied upon by any other party for any other purpose.

**This opinion was not prepared in accordance with the requirements of Treasury Department Circular No. 230. Accordingly, it may not be relied upon for the purpose of avoiding U.S. Federal tax penalties or to support the promotion or marketing of the transaction or matters addressed herein.**

Klein Hornig, LLP

By:   
Erik T. Hoffman  
Partner

<b>Klein Hornig</b> <small>LLP</small> <small>COUNSELORS AT LAW</small>	101 Arch Street	1325 G Street, NW
	Suite 1101	Suite 770
	Boston, MA 02110	Washington, DC 20005
	T 617.224.0600	T 202.842.9006
	F 617.224.0601	F 202.842.3936

~~H.~~ **Attorney's Opinion**

## **Attorney's Opinion Letter**

### **General Instructions**

1. This Opinion **must** be included with application.
2. This Opinion **must** be submitted under law firm's letterhead.
3. The executed Opinion submitted as part of the application **must** be accompanied by a blackline showing that no changes have been made to this form beyond those necessary to complete it (e.g. filling in blanks, selecting bracketed language as appropriate). [January 25, 2024](#)
4. If circumstances unique to a particular application require modification of this form, any such modification **must** be approved by Virginia Housing in writing within six months prior to the application deadline. A copy of any such approval must be included with this executed Opinion as part of the application.
5. **Be aware that there is a 9% version and a Tax Exempt version.** Failure to utilize the correct form or to abide by the instructions above form may result in a point penalty or rejection of the application.

If you have any questions, please contact the Tax Credit Allocation Department at [taxcreditapps@virginiahousing.com](mailto:taxcreditapps@virginiahousing.com).

## **Attorney's Opinion Letter — TAX** **EXEMPT VERSION**

**(This Form Must Be Included With Application)**

**~~This Opinion Must Be Submitted Under Law Firm's Letterhead -- Any changes to the form of opinion other than filing in blanks or making the appropriate selections in bracketed language must be accompanied by a black-lined version indicating all additional changes to the opinion. Altered opinions will still be subject to acceptance by the Authority.~~**

**Date**

**To**

TO: Virginia Housing  
601 South Belvidere Street  
Richmond, Virginia 23220

RE: 2024 Tax Credit Reservation Request (30% present value credits to be paired with tax-exempt bonds)

Name of Development : Somos Phase B

Name of Owner: Somos Phase B, LLC

Dear Virginia Housing:

This undersigned firm represents the above-referenced Owner as its counsel. It has received a copy of and has reviewed the completed application package dated January 25, 2024 (of which this opinion is a part) (the "Application") submitted to you for the purpose of requesting, in connection with the captioned Development, a reservation of low-income housing tax credits ("Credits") available under Section 42 of the Internal Revenue Code of 1986, as amended (the "Code"). It has also reviewed Section 42 of the Code, the regulations issued pursuant thereto and such other binding authority as it believes to be applicable to the issuance hereof (the regulations and binding authority hereinafter collectively referred to as the "Regulations").

Based upon the foregoing reviews and upon due investigation of such matters as it deems necessary in order to render this opinion, but without expressing any opinion as to either the reasonableness of the estimated or projected figures or the veracity or accuracy of the factual representations set forth in the Application, the undersigned is of the opinion that:

1. It is more likely than not that the inclusion in eligible basis of the Development of such cost items or portions thereof, as set forth in the Hard Costs and Owners Costs section of the Application form, complies with all applicable requirements of the Code and Regulations.

~~2.[Select One]~~

2. The calculations (a) of the Maximum Allowable Credit available under the Code with respect to the Development and (b) of the Estimated Qualified Basis of each building in the development comply with all applicable requirements of the Code and regulations, including the selection of credit type implicit in such calculations.

~~OR~~

~~Assuming that you designate the buildings in the Development as being in a difficult development area pursuant to Code Section 42(d)(5)(B)(v), the calculations (a) of the Maximum Allowable Credit available under the Code with respect to the Development and (b) of the Estimated Qualified Basis of each building in the Development comply with all applicable requirements of the Code and regulations, including the selection of credit type implicit in such calculations.~~

~~3.[Select one]~~

3. The information set forth in the Unit Details section of the Application form as to proposed rents satisfies all applicable requirements of the Code and Regulations.

~~OR~~

~~The information set forth in the Unit Details section of the Application form as to proposed rents exceeds the Code rent restrictions; however, the Development will satisfy all applicable requirements of the Code and Regulations due to subsidies such that no tenant will pay rents in excess of what is dictated by the Code and Regulations.~~

4. The site of the captioned Development is controlled by the Owner, as identified in the Site Control section of the Application.

~~5.[Delete if inapplicable] The type of the nonprofit organization involved in the Development is an organization described in Code Section 501(c)(3) or 501(c)(4) and exempt from taxation under Code Section 501(a), whose purposes include the fostering of low income housing.~~

~~6.[Delete if inapplicable] The nonprofit organizations' ownership interest in the development is as described in the Nonprofit Involvement section of the Application form.~~

~~7.[Delete if inapplicable] It is more likely than not that the representations made in the Rehab Information section of the Application form as to the Development's compliance with or exception to the Code's minimum expenditure requirements for rehabilitation projects are correct.~~

~~8.[Delete if inapplicable] After reasonable investigation, the undersigned has no reason to believe that the representations made under the Rehab Information (Ten Year Rule) section of the Application form as to the Development's compliance with or eligibility for exception to the ten year "look-back rule" requirement of Code §42(d)(2)(B) are not correct.~~

Finally, the undersigned is of the opinion that, if all information and representations contained in the Application and all current law were to remain unchanged, upon the placement in service of each building of the Development, the Owner would be eligible under the applicable provisions of the Code and the Regulations to an allocation of Credits in the amount(s) requested in the Application.

This opinion is rendered solely for the purpose of inducing the Virginia Housing Development Authority ("Virginia Housing") to issue a reservation of Credits to the Owner. Accordingly, it may be relied upon only by Virginia Housing and may not be relied upon by any other party for any other purpose.

**This opinion was not prepared in accordance with the requirements of Treasury Department Circular No. 230. Accordingly, it may not be relied upon for the purpose of avoiding U.S. Federal tax penalties or to support the promotion or marketing of the transaction or matters addressed herein.**

~~Firm Name~~



Klein Hornig, LLP

its

By:

A handwritten signature in black ink, appearing to read "Erik T. Hoffman", is enclosed within a blue rectangular box. The signature is written in a cursive style.

Title

Erik T. Hoffman

Partner

Document comparison by Workshare Compare on Tuesday, January 23, 2024  
12:06:45 PM

Input:	
Document 1 ID	file:///C:/Users/dfojas/OneDrive - Klein Hornig LLP/Documents/PDF Workspace/Somos B4 Application\01.23.24\SOMP-B4 VHDA LIHTC Application for Reservation 4% (2024), Opinion(1122047.1).pdf
Description	SOMP-B4 VHDA LIHTC Application for Reservation 4% (2024), Opinion(1122047.1)
Document 2 ID	file:///C:/Users/dfojas/OneDrive - Klein Hornig LLP/Documents/PDF Workspace/Somos B4 Application\01.23.24\SOMP-B4 VHDA LIHTC Application for Reservation 4% (2024), Opinion(1122047.2).docx
Description	SOMP-B4 VHDA LIHTC Application for Reservation 4% (2024), Opinion(1122047.2)
Rendering set	Standard

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<del>Deletion</del>	
<del>Moved from</del>	
<u>Moved to</u>	
Style change	
Format change	
<del>Moved deletion</del>	
Inserted cell	
Deleted cell	
Moved cell	
Split/Merged cell	
Padding cell	

Statistics:	
	Count
Insertions	16
Deletions	40
Moved from	0

Moved to	0
Style changes	0
Format changes	0
Total changes	56

# Tab I:

## Nonprofit Questionnaire (MANDATORY for points or pool)

NOTE: The following documents need not be submitted unless requested by Virginia Housing:

- Nonprofit Articles of Incorporation
- IRS Documentation of Nonprofit Status
- Joint Venture Agreement (if applicable)
- For-profit Consulting Agreement (if applicable)

This deal does not require  
information behind this tab.

# **Tab J:**

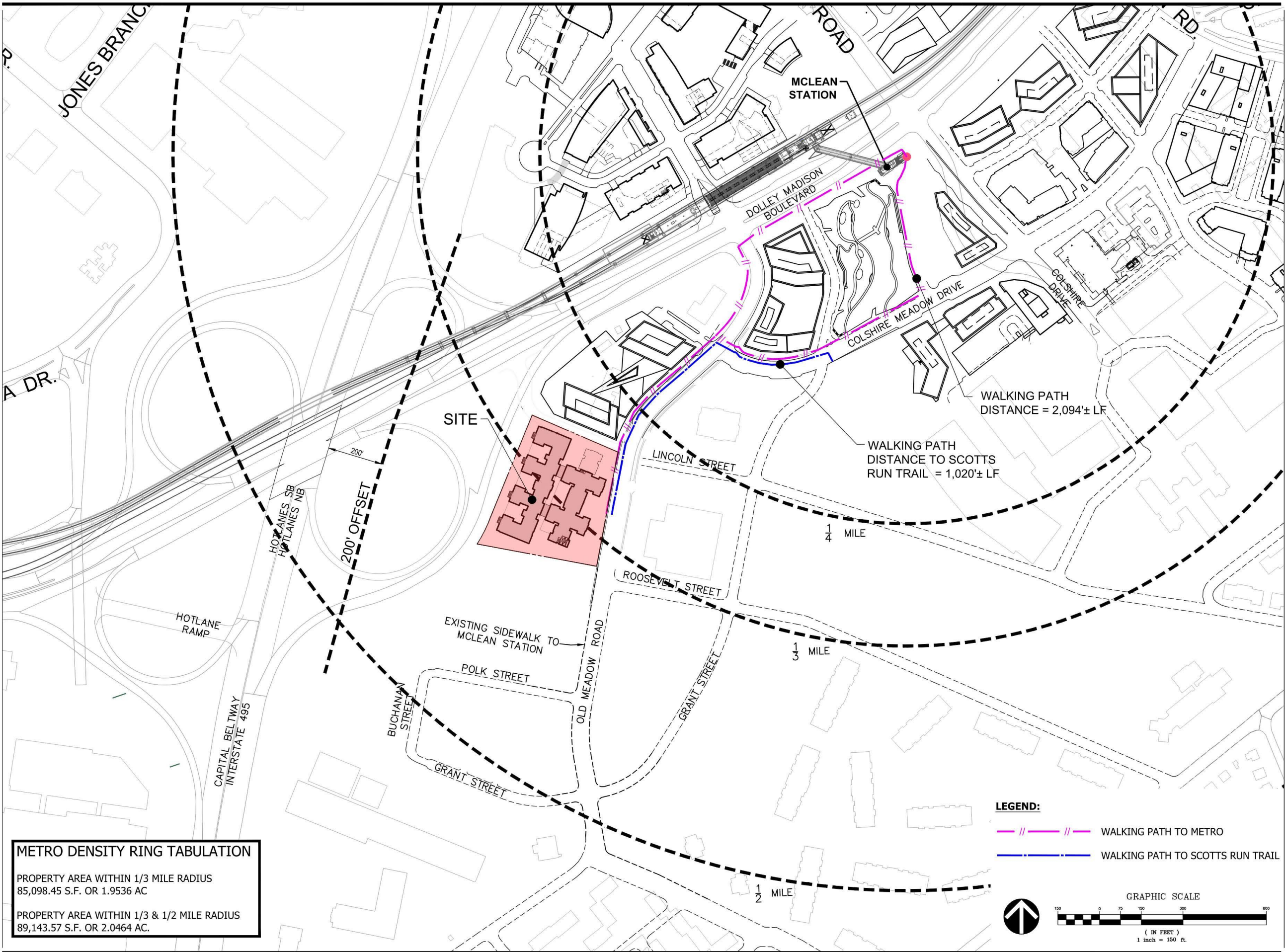
Relocation Plan and Unit Delivery Schedule  
(MANDATORY-Rehab)

This deal does not require  
information behind this tab.

# Tab K:

Documentation of Development Location:





**METRO DENSITY RING TABULATION**

PROPERTY AREA WITHIN 1/3 MILE RADIUS  
85,098.45 S.F. OR 1.9536 AC

PROPERTY AREA WITHIN 1/3 & 1/2 MILE RADIUS  
89,143.57 S.F. OR 2.0464 AC.

LAYOUT: C-10 METRO CONTEXT PLAN, Plotted By: Richardson



VIKA VIRGINIA, LLC  
8180 Greensboro Dr., Suite 200  
Tysons, VA 22102  
703.442.7800 | vika.com

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OWNER/APPLICANT:  
**SOMOS at TYSONS LLC**  
8045 ROOPE BLVD, SUITE 640  
TYSONS CORNER, VA 22182  
STEVE WILSON  
703-942-6610

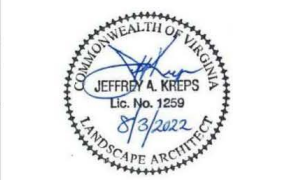
ARCHITECT:  
**DCS DESIGN**  
8614 WESTWOOD CENTER DRIVE, SUITE 800  
TYSONS, VA 22182  
DOUG CARTER  
703-556-9275

LANDSCAPE ARCHITECT:  
**VIKA**  
8180 GREENSBORO DRIVE, SUITE 200  
TYSONS, VA 22102  
JEFF KREPS  
703-442-7800

TRAFFIC CONSULTANT:  
**WELLS & ASSOCIATES, INC.**  
1420 SPRINGHILL ROAD, SUITE 610  
TYSONS, VA 22102  
GRADY P. VAUGHN  
703-917-6620

PLAN STATUS	DATE
RESUBMISSION	11/10/21
RESUBMISSION	03/16/22
RESUBMISSION	06/22/22
RESUBMISSION	08/03/22

PROFESSIONAL SEAL



**SOMOS**  
CONCEPTUAL/FINAL  
DEVELOPMENT PLAN  
PROVIDENCE DISTRICT  
FAIRFAX COUNTY, VIRGINIA

## METRO CONTEXT PLAN

DRAWN BY:	NDR
DESIGNED BY:	RRC
DATE ISSUED:	10/1/2021
DWG. SCALE:	1"=150'
VIKA NO.	VV7543D
SHEET NO.	C-10

FILE: G:\Projects\7543D\CADD\PLANNING\DRAWINGS\7543D\_OVERALL METRO CONTEXT PLAN.dwg USER: Richardson DATE: August 3, 2022 TIME: 8:32:40 AM LAYOUT: C-10 METRO CONTEXT PLAN







# **Tab K.1**

Revitalization Area Certification

RESOLUTION OF BOARD OF SUPERVISORS OF FAIRFAX COUNTY, VIRGINIA  
DESIGNATING THE SOMOS AT MCLEAN METRO HOUSING PROPERTY  
REVITALIZATION AREA PURSUANT TO VIRGINIA CODE § 36-55.30:2

At a regular meeting of the Board of Supervisors of Fairfax County, Virginia, held in the Board Auditorium of the Government Center at 12000 Government Center Parkway, Fairfax, Virginia, on August 2, 2022, at which a quorum was present and voting, the following resolution was adopted:

**WHEREAS**, pursuant to the provisions of the Public-Private Education Facilities and Infrastructure Act of 2002, as amended, the SCG Development Partners, LLC (SCG) (the “Developer”) has proposed to construct approximately 450 affordable rental housing units (the “Development”) on a site located at 1750 Old Meadow Rd. in the Providence District as shown on Attachment 3 (the “Location Map”).

**WHEREAS**, the Developer’s financing plan for the Development includes, among other things, an application to Virginia Housing for competitive nine percent tax credits pertaining to a portion of the proposed Development.

**WHEREAS**, the Virginia Housing tax credit evaluation process provides that 15 additional points may be awarded to projects that meet the definition of a revitalization area pursuant to Virginia Code § 36-55-30:2 (“Revitalization Area”) and have been so designated by resolution of the governing body in which the Revitalization Area is located.

**WHEREAS**, the definition of a Revitalization Area used in Virginia Code § 36-55-30:2 is separate and distinct from terms “Revitalization Area” and “Revitalization District” as used in the various comprehensive plans for Fairfax County, Virginia. Any designation of the Development Site as a Revitalization Area does not in any manner affect any areas of the County that have been, or in the future may be, determined by the Board to be Revitalization Areas or Revitalization Districts.

**WHEREAS**, the Development Site meets the standards for a Revitalization Area as described in Virginia Code § 36-55-30:2, namely that (i) the development of the Development Site will benefit Fairfax County, but that such area lacks the housing needed to induce, among other things, the commercial, governmental, educational, entertainment, community development, healthcare or nonprofit enterprises or undertakings, to locate or remain in such area, and (ii) private enterprise and investment are not reasonably expected, without assistance, to produce the construction or rehabilitation of decent, safe and sanitary housing and supporting facilities that will meet the needs of low and moderate income persons and families in such area and will induce other persons and families to live within such area and thereby create a desirable economic mix of residents in such area.

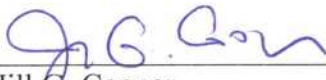
**NOW, THEREFORE, THE BOARD HEREBY DETERMINES** as follows:

The above-referenced proposed Development is located in an area that is hereby designated a Revitalization Area in Fairfax County, Virginia in accordance with Virginia Code § 36-55-30:2.

The Board has determined that (i) the commercial or other economic development of the Revitalization Area will benefit Fairfax County, but that this area lacks the housing needed to induce, among other things, the commercial, governmental, educational, entertainment, community development, healthcare or nonprofit enterprises or undertakings, to locate or remain in this area, and (ii) private enterprise and investment are not reasonably expected, without assistance, to produce the construction or rehabilitation of decent, safe and sanitary housing and supporting facilities that will meet the needs of low and moderate income persons and families in this area and will induce other persons and families to live within this area and thereby create a desirable economic mix of residents in such area.

**ADOPTED** this 2nd day of August, 2022.

A Copy – Teste:



---

Jill G. Cooper

Clerk for the Board of Supervisors

# **Tab K.2**

Surveyor's Certification of Proximity to  
Public Transportation using Virginia  
Housing template



VIKA VIRGINIA, LLC  
8180 Greensboro Dr., Suite 200  
Tysons, VA 22102  
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## Surveyor's Certification of Proximity to Transportation

### General Instructions

1. This form must be included with the Application.
2. Any change in this form may result in a reduction of points under the scoring system.
3. If you have any questions, please contact the Tax Credit Allocation Department  
taxcreditapps@virginiahousing.com.

Date \_\_\_\_\_

To Virginia Housing  
601 South Belvidere Street  
Richmond, Virginia 23220

RE: 2023 Tax Credit Reservation Request

Name of Development \_\_\_\_\_

Name of Owner \_\_\_\_\_

Ladies and Gentlemen:

This letter is submitted to you in support of the Owner's Application for Reservation of Low Income Housing Tax Credits under Section 42 of the Internal Revenue Code of 1986, as amended.

Based upon due investigation of the site and any other matters as it deemed necessary this firm certifies that: the main street boundary entrance to the property is within:

☐ 2,640 feet or ½ mile of the nearest access point to an existing commuter rail, light rail or subway station; **OR**

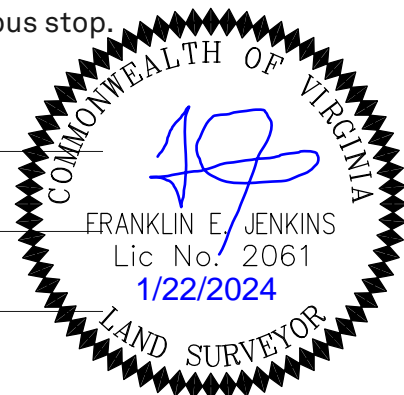
☐ 1,320 feet or ¼ mile of the nearest access point to an existing public bus stop.

Firm Name \_\_\_\_\_

By \_\_\_\_\_

Its \_\_\_\_\_

Title



# **Tab L:**

PHA / Section 8 Notification Letter



## Appendices continued

### PHA or Section 8 Notification Letter

Date 12/12/2023

To Mr. Thomas E. Fleetwood, Director  
3700 Pender Drive, Suite 300  
Fairfax, VA 22030

RE: Proposed Affordable Housing Development

Name of Development Somos Phase B

Name of Owner Somos Phase B, LLC

I would like to take this opportunity to notify you of a proposed affordable housing development to be completed in your jurisdiction. We are in the process of applying for federal low-income housing tax credits from Virginia Housing. We expect to make a representation in that application that we will give leasing preference to households on the local PHA or Section 8 waiting list. Units are expected to be completed and available for occupancy beginning on September 1, 2026 (date).

#### **The following is a brief description of the proposed development:**

Development Address \_\_\_\_\_  
1750 Old Meadow Road  
McLean, VA 22102

#### **Proposed Improvements:**

<input checked="" type="checkbox"/> New Construction:	<u>225</u> #Units	<u>1</u> #Buildings
<input type="checkbox"/> Adaptive Reuse:	_____ #Units	_____ #Buildings
<input type="checkbox"/> Rehabilitation:	_____ #Units	_____ #Buildings

#### **Proposed Rents:**

<input checked="" type="checkbox"/> Efficiencies:	\$ <u>1,536</u>	/month
<input checked="" type="checkbox"/> 1 Bedroom Units:	\$ <u>1,340-1,922</u>	/month
<input checked="" type="checkbox"/> 2 Bedroom Units:	\$ <u>1,601-2,300</u>	/month
<input checked="" type="checkbox"/> 3 Bedroom Units:	\$ <u>1,854-2,661</u>	/month
<input type="checkbox"/> 4 Bedroom Units:	\$ _____	/month

#### **Other Descriptive Information:**

Located walking distance to the McLean Metro Station in Fairfax County. Somos Phase B will be new  
construction of 225 units of affordable multifamily housing.

## Appendices continued

**PHA or Section 8 Notification Letter**

We appreciate your assistance with identifying qualified tenants.

If you have any questions about the proposed development, please call me at ( 703 ) 942 - 6610 .

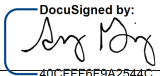
Please acknowledge receipt of this letter by signing below and returning it to me.

Sincerely yours,

Name Stephen P. Wilson

Title Authorized Representative of Somos Phase B, LLC

**To be completed by the Local Housing Authority or Sec 8 Administrator:**

Seen and Acknowledged By  40CFF6F69A2544C...

Printed Name: Amy Ginger

Title Assistant Secretary

Phone 703-246-5134

Date 12/12/2023 | 15:17:57 EST

# Tab M:

Intentionally Blank

This deal does not require  
information behind this tab.

# Tab N:

Homeownership Plan

This deal does not require  
information behind this tab.

# Tab O:

Plan of Development Certification Letter

This deal does not require  
information behind this tab.



# **Tab P:**

Zero Energy or Passive House documentation for  
prior allocation by this developer

This deal does not require  
information behind this tab.

# **Tab Q:**

Documentation of Rental Assistance, Tax Abatement  
and/or existing RD or HUD Property

This deal does not require  
information behind this tab.

# **Tab R:**

Documentation of Utility Allowance calculation



January 22, 2024

Jennifer Schneider  
SCG Development Partners, LLC  
8245 Boone Boulevard, Suite 640  
Tysons Corner, VA 22182  
JLS@scgdevelopment.com

RE: Preliminary Utility Allowance for Somos Phase B

Dear Ms. Schneider,

Please see the following Preliminary Utility Allowance (UA) for Somos Phase B located in McLean, Virginia. Projections were generated with the applicable rates, fees, and taxes of following providers:

Electricity:	Dominion Energy	Gas:	N/A
Water:	Fairfax Water	Trash:	N/A
Sewer:	Fairfax County		

The utility rates used to produce this UA are no older than the rates in place 60 days prior to the date of this letter. Below is a table depicting the highest monthly UA by each bedroom type. Should you have any questions do not hesitate to contact me.

UTILITY ALLOWANCE			ALLOWANCES BY BEDROOM SIZE				
Utilities	Utility Type	Paid by	Studio	1-bdr	2-bdr	3-bdr	4-bdr
Heating	Electric	Tenant	\$ 11.05	\$ 14.24	\$ 17.26	\$ 20.29	N/A
Air Conditioning	Electric	Tenant	\$ 5.16	\$ 6.65	\$ 8.06	\$ 9.47	N/A
Cooking	Electric	Tenant	\$ 4.42	\$ 5.70	\$ 6.90	\$ 8.12	N/A
Lighting	Electric	Tenant	\$ 17.69	\$ 22.78	\$ 27.62	\$ 32.46	N/A
Hot Water	Electric	Tenant	\$ 10.32	\$ 13.29	\$ 16.11	\$ 18.94	N/A
Water	-	Tenant	\$ 12.70	\$ 15.28	\$ 20.43	\$ 25.58	N/A
Sewer	-	Tenant	\$ 32.13	\$ 37.86	\$ 49.32	\$ 60.79	N/A
Trash	-	Owner	\$ -	\$ -	\$ -	\$ -	N/A
Total UA costs (Unrounded)			\$ 93.47	\$ 115.80	\$ 145.70	\$ 175.63	\$ -

*\*Allowances only for Somos Phase B as an ENERGY STAR and EarthCraft Gold project. The water and sewer projections were produced using water fixtures with flow rates of 1.28 gpf toilets, 2.0 gpm showerheads, 2.2 gpm kitchen faucets, and 1.5 gpm lavatory faucets. Due to rounding, the amounts for the UA components may not add up to the Total UA amount.*

Sincerely,

Lauren Thomson  
Project Manager

# **Tab S:**

Supportive House Certification and/or  
Resident Well Being MOU

This deal does not require  
information behind this tab.



# Tab T:

Funding Documentation

This deal does not require  
information behind this tab.

# **Tab U:**

Acknowledgement by Tenant of the availability of Renter  
Education provided by Virginia Housing



8245 Boone Boulevard, Suite 640 | Tysons Corner, VA 22182 | 703.942.6610  
SCGDEVELOPMENT.COM

## Virginia Housing Free Housing Education Acknowledgement

I \_\_\_\_\_, have read, understand, and acknowledge, I have been presented information regarding the Virginia Housing free renter education to tenants.

I understand that it is my responsibility to review the website link provided here

[www.virginiahousing.com/renters](http://www.virginiahousing.com/renters).

By signing below, I acknowledge that I have read, and understand the terms of all items contained in this form.

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

Resident Signature: \_\_\_\_\_

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

# **Tab V:**

Nonprofit or LHA Purchase Option or Right of First  
Refusal

This deal does not require  
information behind this tab.

# **Tab W:**

Internet Safety Plan and Resident Information Form (if  
internet amenities selected)

# INTERNET USE AGREEMENT

DRAFT



THIS INTERNET USE AGREEMENT represents the complete agreement and understanding between Somos Phase B, LLC, and the tenant, for the use of internet access service provided by Somos Phase B, LLC ("Service"). Tenant's use of Service shall constitute tenant's acceptance of the terms and conditions of this agreement including the Internet Operating Policies. Upon notice published on-line via the Somos Phase B, LLC web site, Somos Phase B, LLC may modify these terms and conditions, and amplify them, as well as discontinue or change the services offered. Tenant's use of Service after modification shall constitute tenant's acceptance of the modifications.

## TERMS AND CONDITIONS

**PROVISION OF SERVICES.** The Service is a service whereby a tenant may gain direct high-speed access to the Internet via Wi-Fi, where provided.

**SERVICE RATES AND CHARGES.** The Service is provided free of charge as a convenience to the tenant and is not provided as a service with economic value.

**LIMITATION OF WARRANTIES AND LIABILITY; DISCLAIMER OF WARRANTIES.** Your use of the Service is at your own risk. Neither Somos Phase B, LLC nor any of its underlying service providers, information providers, licensors, employees, or agents, warrant that the Service will be uninterrupted or error free; nor does Somos Phase B, LLC or any of its underlying service providers, information providers, licensors, employees, or agents, make any warranty as to the results to be obtained from the use of the Service. THE SERVICE IS DISTRIBUTED ON AN "AS IS", "AS AVAILABLE" BASIS WITHOUT WARRANTIES OF ANY KIND, EITHER EXPRESS OR IMPLIED, INCLUDING BUT NOT LIMITED TO WARRANTIES OF TITLE, OR IMPLIED WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE OR OTHERWISE, OTHER THAN THOSE WARRANTIES (IF ANY) WHICH ARE IMPLIED BY AND INCAPABLE OF EXCLUSION, RESTRICTION, OR MODIFICATION UNDER THE LAWS APPLICABLE TO THIS USE AGREEMENT, ALL SUCH WARRANTIES BEING EXPRESSLY DISCLAIMED. NEITHER LOOKING GLASS APARTMENTS, LLP NOR ANY OF ITS UNDERLYING SERVICE PROVIDERS, INFORMATION PROVIDERS, LICENSERS, EMPLOYEES, OR AGENTS SHALL BE LIABLE FOR INCIDENTAL, CONSEQUENTIAL, INDIRECT OR SPECIAL DAMAGES SUFFERED BY YOU OR ANY OTHER PARTY AS A RESULT OF THE OPERATION OR MALFUNCTION OF THE SERVICE, REGARDLESS OF WHETHER OR NOT SUCH PARTIES HAVE BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

YOU EXPRESSLY ACKNOWLEDGE THAT THE PROVISIONS OF THIS SECTION SHALL ALSO APPLY TO ALL CONTENT OR OTHER SERVICES AVAILABLE THROUGH THE SERVICE. YOU AGREE THAT YOU WILL NOT IN ANY WAY HOLD ARROWBROOK CENTRE

APARTMENTS RESPONSIBLE FOR ANY SELECTION OR RETENTION OF, OR THE ACTS OR OMISSIONS OF, THIRD PARTIES IN CONNECTION WITH THE SERVICE (INCLUDING THOSE WITH WHOM SOMOS PHASE B, LLC MAY CONTRACT TO OPERATE VARIOUS AREAS ON THE SERVICE).

You assume total responsibility and risk for your use of the service and the Internet. SOMOS PHASE B, LLC DOES NOT MAKE ANY EXPRESS OR IMPLIED WARRANTIES, REPRESENTATIONS OR ENDORSEMENTS WHATSOEVER (INCLUDING WITHOUT LIMITATION WARRANTIES OF TITLE OR NONINFRINGEMENT, OR THE IMPLIED WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE) WITH REGARD TO THE SERVICE, ANY MERCHANDISE, INFORMATION OR SERVICE PROVIDED THROUGH THE

SERVICE OR ON THE INTERNET GENERALLY, AND SOMOS PHASE B, LLC SHALL NOT BE LIABLE FOR ANY COST OR DAMAGE ARISING EITHER

DIRECTLY OR INDIRECTLY FROM ANY SUCH TRANSACTION. It is solely your responsibility to evaluate the accuracy, completeness and usefulness of all opinions, advice, services, merchandise, and other information provided through the service or on the Internet generally. Somos Phase B, LLC does not warrant that the service will be uninterrupted or error-free or that defects in the service will be corrected.

You understand further that the Internet contains unedited materials, some of which are sexually explicit or may be offensive to you. You access such materials at your own risk. Somos Phase B, LLC has no control over and accepts no responsibility whatsoever for such materials.

Your sole and exclusive remedy for any failure or non-performance of the Service (including any associated software or other materials supplied in connection with the Service) shall be for Somos Phase B, LLC to use commercially reasonable efforts to effectuate an adjustment or repair of the Service.

**INDEMNIFICATION BY USER.** You shall indemnify and hold harmless Somos Phase B, LLC and any of its underlying service providers, information providers, licensors, employees or agents from and against any and all claims, demands, actions, causes of action, suits proceedings, losses, damages, costs, and expenses, including reasonable attorney fees, arising from or relating to your use of the Service, or any act, error, or omission of you or any user of your account in connection therewith, including, but not limited to, matters relating to incorrect, incomplete, or misleading information; libel; invasion of privacy; infringement of a copyright, trademark, service mark, or other intellectual property; any defective product or any injury or damage to person or property caused by any products sold or otherwise distributed through or in connection with the Service; or violation of any applicable law.

**OTHER RESPONSIBILITIES OF USER.** You agree that you will be responsible for all usage of the Service and any other services accessed through the Service whether or not authorized by you. You agree to pay any applicable fees or charges by any applicable due date, and to pay any interest or late fees incurred for late payment of the required fees. You agree not to transmit or publish on or over the Service any information, software or other content which violates or infringes upon the rights of any others or to use the facilities and capabilities of the Service to conduct any business or activity or solicit the performance of any activity which is prohibited by law. You agree to comply with all applicable laws, rules and regulations in connection with the Service. You acknowledge that you are aware that certain content, services or locations of the Service or of other parties that may be accessible through the Service may contain materials that are unsuitable for minors (persons under 18 years of age). You agree to supervise usage of the Service by any minors whom you permit to use the Service. You agree to perform independent backup of data stored on your computer as Somos Phase B, LLC is not responsible for personal files residing on your computer.

**TERM.** This agreement for the use of the Service will be in effect from the date your completed registration is accepted by Somos Phase B, LLC or the time you first access the Service whichever comes first. This agreement and your use of the Service may be terminated by either you or Somos Phase B, LLC at any time by written notice to the other, or by Somos Phase B, LLC at any time with or without notice for your non-payment, other default, or violation of any terms of this Internet Use Agreement or Internet Operating Policy. The provisions of paragraph 4.0 and all other obligations of and restrictions on

you and any user of your Service shall survive any termination of this Internet Use Agreement and Internet Operating Policy.

MISCELLANEOUS. This Internet Use Agreement and Internet Operating Policy shall be governed and construed in accordance with the laws of the State of Virginia applicable to agreements made and to be performed in Virginia. You agree that any legal action or proceeding between Somos Phase B, LLC and you for any purpose concerning these agreements or the parties' obligations hereunder shall be brought exclusively in a federal or state court of competent jurisdiction sitting in Virginia. Any cause of action or claim you may have with respect to the Service must be commenced within one (1) year after the claim or cause of action arises or such claim or cause of action is barred. Somos Phase B, LLC's failure to insist upon or enforce strict performance of any provision of this Agreement shall not be constructed as a waiver of any provision or right. Neither the course of conduct between the parties nor trade practice shall act to modify any provision of this Agreement. Somos Phase B, LLC may assign its rights and duties under this Agreement to any party at any time without notice to you.

SERVICE IS PROVIDED ON THE FOLLOWING TERMS:

1. Somos Phase B, LLC is not responsible for the provision, performance, and support of your PC. Somos Phase B, LLC provides support for Service only to the Wi-Fi system. Support for your PC and any connecting Ethernet cables or any other devices to the wall jack is your responsibility.
2. You are solely responsible for keeping your computer secure and free of viruses or other harmful programs that can directly or indirectly interfere with the operations of the Service, and that of third parties connected to its networks. You are solely responsible for guarding against and repairing your computer and other systems from any infection by malicious code or unauthorized use.
3. Somos Phase B, LLC cannot guarantee security and it is essential that you make use of a personal firewall, and anti-virus software due to the "always-on" nature of the Service. In addition, Somos Phase B, LLC strongly recommends you add further security protection by obtaining current updates to your application software.
4. You may not use the Service in any way which, in Somos Phase B, LLC's sole opinion, is, or is likely to be, detrimental to the provision of the Service to any other Somos Phase B, LLC tenant. This includes, but is not limited to, running any application or program that places excessive bandwidth demands on the Service. If Somos Phase B, LLC determines you are using excessive bandwidth, at our discretion we may reduce the bandwidth available, or temporarily suspend or permanently disconnect the Service (with or without notification). Somos Phase B, LLC automatically blocks file sharing usage.
5. Occasionally, we may need to temporarily suspend the Service for repairs or planned maintenance and upgrades. Where this occurs, we will give you as much notice as is reasonably possible under existing circumstances.
6. We cannot guarantee that the Service will never be faulty, however we will respond to all reported faults as soon as is reasonably possible.
7. Somos Phase B, LLC reserves the right to email Service announcements to you as part of the Service. It is the tenant's responsibility to notify the office of a change of email address.
8. You may not use the facilities and capabilities of the Service to conduct any activity or solicit the performance of any illegal or criminal activity.

9. You may not send proactively, receive, upload, download, use or re-use any information or material which is offensive, abusive, indecent, defamatory, obscene or menacing, or in breach of confidence, copyright, privacy or any other rights.
10. You may not do anything which is contrary to the acceptable use policies of any connected networks and Internet standards.
11. You may not post or transmit any file which contains viruses, worms, "Trojan horses" or any other contaminating or destructive features.
12. You may not hack into any aspect of the Service.
13. You may not circumvent, or attempt to seek to circumvent, any of the security safeguards of Somos Phase B, LLC or any of its suppliers or vendors.
14. You may not use the Service to cause annoyance, interference, inconvenience or needless anxiety to tenants or others.
15. You may not send or provide any unsolicited advertising or other promotional material, commonly referred to as "spam" by email or by any other electronic means.
16. You may not send email or any other type of electronic message with the intention or result of affecting the performance or functionality of any computer facility.
17. You may not use the Service other than for your personal use, and you acknowledge that Somos Phase B, LLC shall not in any way whatsoever be liable to you or to any third party for any personal losses (including without limitation any loss of profits, business or anticipated savings or for any destruction of data) suffered in anyway whatsoever by you or any third party.
18. You may not employ a misleading email address or name or falsify information in the header, footer, return path or any part of any communication, including without limitation any email transmitted through the Service.
19. You may not permit any third party to do any of the above.
20. A current copy of the Internet Use Agreement is posted at (TBD). The version of this User Agreement and Operating Policy stored at that URL is considered the current and binding version.
21. If any aspect of these terms and conditions is found to be unenforceable or unlawful, then that provision shall be deemed severable from these terms and conditions and shall not affect the validity and enforceability of any remaining provisions.
22. These Terms and Conditions and the Internet Use Agreement set out the whole of our agreement relating to our supply of the Service. They cannot be varied except in writing by a managing partner of Somos Phase B, LLC. In particular nothing said by any employee or person on behalf of Somos Phase B, LLC should be understood as a variation of these Terms and Conditions or an authorized representation about the Service or the nature and quality of items displayed thereon. Somos Phase B, LLC shall have no liability for any such representation being untrue or misleading.

Signed on \_\_\_\_\_, 20\_\_\_\_.

Tenant Signature \_\_\_\_\_.

## Somos Phase B, LLC DRAFT

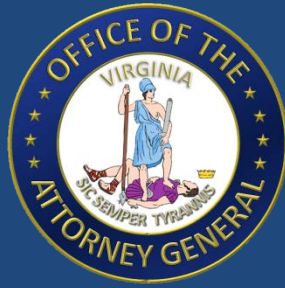
### Internet Security Plan

Secure wireless networks at Somos Phase B, LLC will provide our residents with a safe and convenient way to have internet access within their apartment homes and in certain common areas throughout the property.

Security is the foundation of every successful Wi-Fi network. Keeping our residents and the property secure will be a top priority for Somos Phase B, LLC. Somos Phase B, LLC will hire a third-party service provider to monitor and maintain the resident Wi-Fi system.

Security infrastructure will need to control where our residents can go on the network and what they can do on the network. Somos Phase B, LLC and their third-party service provider will install:

1. Firewall protections. The Firewall will include integrated security features, including anti-virus protection, spam filtering, DPI, and application filtering. The Firewall will be able to see which devices and applications are being used on the network. The Firewall can scan applications for security threats and only allow approved applications to be used on the network.
2. Intrusion Detection System (IDS). An intrusion detection system monitors the network for malicious activity or policy violations. Any malicious activity or violation is typically reported either to the third-party administrator or collected centrally using a security information and event management system.
3. Resident Profiles. Each resident will be required to complete a unique profile to allow Somos Phase B, LLC and the third-party service provider to know who is using the Wi-Fi, devices using the Wi-Fi, and potential tampering with the Wi-Fi services.
4. All residents will be required to sign an Internet Service Use Agreement and will receive Internet Education Training from Somos Phase B, LLC and the third-party service provider.



# Internet Safety

Playing it safe while playing online



Hi there kids! I am Charlie Cardinal and this is Speedy the Crime Fighting Hamster. We are here to introduce you to the basics of Internet Safety and some of the villains you need to watch out for. There are some bad characters out there, so you have to protect yourself. Your parents won't always be there to watch out for you, so stay sharp, learn all you can, and stay safe!



# Privacy & Personal Information



Privacy is being able to keep things secret or hidden from others.

Personal Information is information about you or your family such as your address, a social security number, your parent's bank account, or how much money they have.

Criminals love to get people's personal information because they can pretend to be you, or use your money to buy things.

They can also make money off of your information by selling it to others. Companies or other criminals will use your info to send you junk mail or spam emails.

Criminals learning your address can be very bad. They may break in and steal from you. Protect your safety and your belongings, by keeping your information a secret.

These bad people may even use your personal information to trick someone else in your circle of friends and family. People sometimes tell criminals things that they shouldn't if they think that they are communicating with someone they know.



Think before you click



Do you know who sent that email?





# Passwords

One of the most important things you need to learn is how to create strong passwords. A password is a code you type in to let the computer know it is really you.

Having an easy to guess password could allow someone to snoop around in your private information.

The way to make your password strong is to never use your name or your birthday. Use something hard to guess, but easy for you to remember. Make your password at least 8 characters long, and mixing numbers, symbols, and upper and lower case letters makes the password strong just like Speedy. Avoid using the same password over and over. That way if they do figure out your password, they only gain access to one account. And never leave your passwords written down where someone can find it.



A great tool online that creates kid friendly passwords is the website, [www.dinopass.com](http://www.dinopass.com)

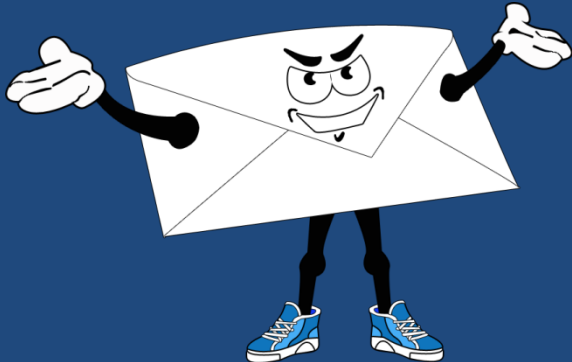
# Spam



Spam is basically email that you receive from different companies or strangers that you did not sign up for. Most times it isn't from real companies and usually the sender is up to no good.

Spam emails can sometimes be a phishing scam. Phishing emails are emails that look like it is from some trusted source. A place like your bank, the IRS where taxes are collected, or some other business you shop with often. They make their email look like it is the real thing with logos, and they put links in the email baiting you to click them. Once you click the link, you could be launching a program that can damage your computer in some way or collect your personal information.

Spam emails can also use winning a sweepstakes or some other type prize to trick you into trusting the email source. After they hook you in, they inform you that to collect your prize, you must give them your credit card number.



How do you know it is spam?

Spam emails typically have a bunch of spelling and grammar errors or a mention of someone you don't know in the subject line. Don't Open It! Delete those emails right away.



# Malware



Malware is a program written with the intent to harm your computer in some way.

Programs such as this, may be waiting for you to do something(a trigger), so that it can run. This could be the clicking of the link or opening an email attachment.

When searching for free downloads online, be very careful. There are a lot of sites out there trying to trick you. They will pay to make their site get returned at the top of the list of search results. Then when you access the page, they use blinking buttons to trick you to click. The result of clicking usually ends up being your computer loaded up with malware.

Once your machine is infected, it can change browser settings, create unusual popup ads on your computer and then pass the malware on to someone else.



Spyware is a program that gets onto your computer through a download or a virus and it gathers information about you and sends this back to its creator.

Some of the types of information spyware might send back to home base is email addresses of you or your contacts, passwords, account numbers, and credit card numbers.

Some spyware out there records how you use your computer and what you search for online.

# Adware

Adware is software that you are allowed to use by the author because of the advertisements that pop up occasionally during the game. Many of these type games you will find in the form of apps on your phone or devices.

Through the addition of advertisements, the developer gains some income that may supplement a discount to the user, sometimes making the software free.

Often after using the product with the ads, a consumer will purchase the software to get rid of the ads.

<http://www.pctools.com/security-news/what-is-adware-and-spyware/>



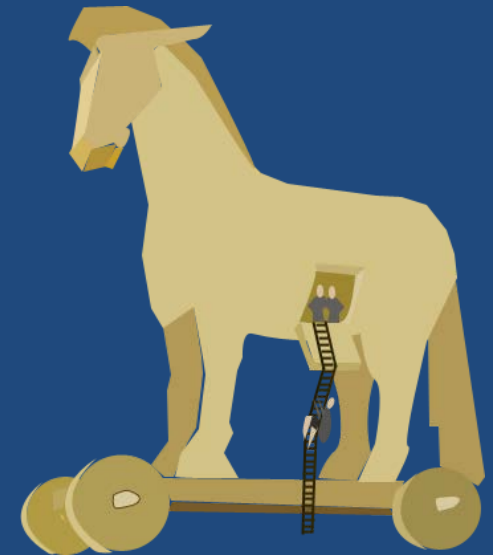
# Trojan Horse

The name for the Trojan Horse virus was derived from tale of the Trojan Horse constructed by the Greeks to gain access to the city of Troy. The wooden horse was left at the gates as an offering to Athena. The horse was then wheeled into the city and out came Greek fighters hiding inside. <http://www.britannica.com/topic/Trojan-horse>

A Trojan horse virus is a form of malware that is dressed up as something interesting or software from a source we are familiar with. The purpose is to trick the person into installing it. This allows the creator of the Trojan to do damage to data or software on your computer. They also will set up a 'back door' or access point that allows them to access your system.

Trojan viruses don't spread by infecting other files and they cannot duplicate themselves.

<http://www.webopedia.com/DidYouKnow/Internet/virus.asp>



# Worms

Worms are malware that can duplicate itself and spread to other computers. Worms always do something bad, even if it is just slowing things down.

Worms will frequently set up the ability for computers to be taken over by the worm's author by creating backdoors on the host computer. These computers are then called a “zombie computer”. “Zombie computers” can be used to send out spam or as a shield to hide the web address of people who want to do bad things.

<http://www.webopedia.com/TERM/Z/zombie.html>





# Virus

A virus is a small program that is created to spread from one computer to the next and to mess up the way your computer works.

Many times viruses hop from computer to computer via email attachments or messages. They can also hide in funny pictures(memes), e-cards, or other desirable file attachments. It can also be sent through an instant message.

A virus can corrupt your data, or worse, delete it. It can also email copies of itself to your friends.

Keeping your anti-virus software up to date is key to protecting against the latest viruses and other security threats.

<https://www.microsoft.com/security/pc-security/virus-what-is.aspx>



# Social Media

Privacy settings on social media accounts are set up as public when you first get one. Unless you want everyone to be able to look at all of your photos and other private stuff, you must go into your account settings and change this.



Something to remember is whatever you post and say on your page can be shared by your friends. Think about what you post online, BEFORE you do it. What you post, could be seen by anyone at any time depending on your settings and the friends you keep. Because we can take pictures of our screens, there is really no setting that can protect you. Think twice about what you are sharing with others, so there are no regrets later.

Make sure you know the people that you accept friend requests from. Sometimes people try to friend you to hack your Facebook account or access your contacts. Once you are hacked they will send out strange messages or friend requests to your contacts. Protect your friends and yourself by being cautious with friends and creating strong passwords for your social media accounts.

# Geotagging



Geotagging is the bit of data that your electronic device packages with your picture that has information about where the picture was taken. This is something that can be turned on and off in your device and typically comes turned on until you change the setting.

When your photo is geotagged, this gives people information about your location. Letting outsiders know where you are, can allow them to plan to steal your belongings or vandalize your home.

Consider if you post a photo every Wednesday in your outfit ready to walk to ball practice and geotagging is turned on. This shows you have a routine and gives a rough area you will be in. A predator could come and take you away.

Another issue with allowing the geotagging to occur is you don't have control of your own privacy. Everyone does not need to know where you are all of the time, keep this information private.

<http://www.nytimes.com/2010/08/13/technology/personaltech>



# Be Careful of What You Say!



Defamation: Defamation is the blanket word used for all types of untrue statements made about others. [Definition of Defamation on Law.com](#)

Slander: When someone orally tells one or more people an untruth about someone, which will harm the reputation of the person it is about. It is not slander if the untruth is in writing of some sort or if it is broadcast through television or radio.

[Definition of Slander on Law.com](#)

Libel: This is where someone publishes to print(including pictures), written word, online posts, blogs, articles, or broadcast through radio, television, or film, an untruth about another which will do harm to the person's reputation. [Definition of Libel on Law.com](#)



# Be Careful of What You Say!



Much of the things people post online may get ignored, and you may get lucky and avoid legal action. But, when someone gets angry and files a lawsuit it can cause a major headache and possibly hit you hard in the wallet.

You might think you should have a right to openly complain about a company and their bad service or lousy product. Well when it comes to this, it is not always that simple. You can get sued for this and even if the judge agrees with you, you still have to pay for a defense attorney. Think twice and make sure that whatever you have to say is worth any headache you may have pop up later.

<http://ideas.time.com/2013/01/07/yelp-reviewers-beware-you-can-get-sued/>

On social media, people get into the habit of letting their emotions get the better of them and they end up speaking their minds about others online. When that person feels that this damages their character, they may opt to sue the other person for defamation. Even if their case is not successful, the stress, money, and time that you spend defending yourself is not worth it. To read more about defamatory social media posts, [click here](#).

# Stranger Danger Online



When you think of being on your computer or other electronic device in your own home, you probably think you are safe. Your mom is in the next room, what could happen?

Well there are people online that are up to no good. They go in chat rooms and pop up on your instant messenger, looking for someone to “groom”.

What is grooming you say? Well, grooming is when a stranger(can be any age) finds someone they are interested in, usually a minor. They act really nice and maybe they pretend they are much younger than they really are, like they are a kid just like you. Then they try to get you to like them and to trust them. They may ask you not to tell anyone you are talking to them. This is not okay and is a warning sign of a possible groomer.

# How to Protect Yourself in Online Chats

- Choose chat sites designed for kids, such as [www.kidzworld.com](http://www.kidzworld.com). Kidzworld is moderated and its aim is to protect kids from unwanted requests and online bullying.
- Beware of people you don't know. If they are asking too many questions or being too friendly they may be up to no good.
- If someone asks you to send them a picture or sends you a picture or video that is inappropriate, tell an adult or report them to the site moderators.
- Don't give out personal information to strangers online
- Don't tell strangers where you live or give them your telephone number
- Don't send strangers pictures of you or others
- If you are being bullied or threatened online, tell an adult or someone you trust





# Cyberbullying

- Cyberbullying is the **willful and repeated harm** inflicted through the use of computers, cell phones, and other electronic devices.
- Using PhotoShop or other tools to create harassing images.
- Posting jokes about another person on the internet
- Using the internet to entice a group to physically harm another person.
- Making threats online using IM, email, social networking sites, or other electronic devices.



# Consequences of Cyberbullying

Anything that you write, pictures that you post, or videos that you upload can be used by your school to suspend you.

College students have been removed from their athletic teams and lost college funding for writing negative comments about their coach.

When applying to colleges, they will search online to see what kind of person you are. They can deny you access if they don't like what they find.

When businesses are looking at people to hire for a job they will many times use social media to see what kind of person they are. Mean or inappropriate type posts can prevent you from getting the job you desire.

Cyberbullying can also be considered a crime and participating in this type of behavior can land you in big trouble.



# Consequences of Cyberbullying

- § 18.2-152.7:1. Harassment by Computer; Penalty makes cyberbullying a crime.
- Carries a \$2500 fine and punishable by up to **12 months in prison.**

There are many websites designed to inform and decrease the number of bullying cases we see each year. The U.S. Department of Health and Human Services has created a website with lots of resources to help combat bullying of all kinds - [www.stopbullying.gov](http://www.stopbullying.gov)  
If you experience cyberbullying or witness it, tell someone such as a school counselor, teacher, or a parent.





# The Effects of Cyberbullying

- Victims feel depressed, sad, angry, and frustrated.
- Victims become afraid and/or embarrassed to attend school.
- Can lead to low self-worth, family problems, academic problems, school violence, and bad behavior.
- Victims can also develop thoughts of killing themselves and possibly act on these feelings.
- There are no positive effects of cyberbullying, only pain and suffering for the victims.
- The affects of being bullied can affect the victim into adulthood and prevent them from being all they can be in the future.



# Dealing with Cyberbullying

- Never do the same thing back, 2 wrongs don't make a right
- Tell them to stop
- Block their access to you
- Report it to the site you are on such as Facebook or Twitter
- NEVER pass along messages from cyberbullies, stop the spread of this behavior
- Set up privacy controls and keep the bully out of your friends list
- Don't be a cyberbully yourself
- If you witness someone getting bullied, tell someone so it can be stopped. Many times the person being bullied won't tell out of fear.
- Spread the word that bullying is not cool
- Don't laugh or encourage the bully, it is not funny and it can lead to major trouble for the person doing the bullying.

# **Tab X:**

Marketing Plan for units meeting accessibility  
requirements of HUD section 504

This deal does not require  
information behind this tab.

# **Tab Y:**

Inducement Resolution for Tax Exempt Bonds

This deal does not require  
information behind this tab.

# **Tab Z:**

Documentation of team member's Diversity, Equity and  
Inclusion Designation



This deal does not require  
information behind this tab.

# **Tab AA:**

Priority Letter from Rural Development

This deal does not require  
information behind this tab.

# **TAB AB:**

Social Disadvantage Certification

This deal does not require  
information behind this tab.