

**OKLAHOMA HOUSING FINANCE AGENCY
MANAGEMENT CHANGE REQUEST CHECKLIST**

OHFA File No: _____

Development Name (& aka): _____

Owner Name, Address, Contact Person w/title, Email address, and Phone number:

CHANGE REQUIREMENTS:

Piecemeal filings will not be accepted.

___ **A. Effective date of proposed change:** _____

___ **B. Proposed Management Company Name, Address, Contact Person w/title, Email address, Phone number, and Tax ID#:**

___ C. **Resume of proposed management company showing previous experience in Tax Credit management and length of time managed. If applicable, OHFA will need to see the executed contract between Management Company and Consultant or Co-mgmt. OHFA requires no less than 3 years of Tax Credit compliance experience.**

___ D. **A written explanation as to why the change was necessary. If the change has been completed, the owner must explain why OHFA was not consulted prior to the change.**

___ E. **Proof of current license with the Oklahoma Real Estate Commission or meet applicable OREC exemptions as defined by Title 59 Section 858-301 by the Oklahoma Real Estate License Code as Amended Through November 1, 2019 or a later date.**

___ F. **A copy of the Management Agreement between the development and the new management company is to be provided within 14 days following the change. If the change has taken place, the agreement must be provided with this change request.**

___ G. **A \$650.00 fee per development shall be imposed to cover OHFA's costs of handling conduct the request. This fee shall accompany the request and shall be non-refundable.**

OHFA will conduct an on-site inspection within 12 months after the effective date of a management change to ensure compliance. If a management company fails to show capacity to manage, (i.e. have outstanding fees, outstanding reports or negative points), approval to transfer management could be denied.

Printed Name

Owner requesting change

Date

The attachments and statements made are accurate and true to the best of signer's knowledge.

NOTE: Section 1001 of Title 18 of the U.S. Code makes it a criminal offense to make willful false statements or misrepresentations to any Department or Agency of the United States as to any matter within its jurisdiction.

The above information must be submitted to:
Oklahoma Housing Finance Agency
Housing Tax Credit Compliance / Management Change
100 NW 63rd, Suite 200
Oklahoma City, OK 73116