



Answer the following questions as accurately as possible for the period of July 01, 2022 - June 30, 2023.

Property Information

Property Name:

Physical Occupancy as of June 30, 2023 (percent):

Economic Occupancy as of June 30, 2023 (percent):

Does the property have a waiting list?

If yes, what is the number on the waiting list?

Is the property a LIHTC property?

Does the property have Project-Based Section 8 (PBS8)?

Who is responsible for paying utilities?

What utility schedule does your property use if tenant pays utilities?

Habitability of Property

How many tenants reported complaints regarding their units?

What was the nature of those complaints?

How frequently does management inspect units?

Excluding Louisville Metro Government, has the property had any other third-party inspections (e.g. KHC, LMHA)? If so, which entity conducted the inspection, when was it conducted, and what were the results?



Replacement Reserves & Operating Costs

What is the property's annual per unit replacement reserve contribution?

What is the balance as of June 30, 2023?

Where is the replacement reserve held?

Were funds expended from the replacement reserve from July 01, 2022 - June 30, 2023? If so, how much was expended?

What was the nature of the expenditure?

Will the property be making any capital improvements within the next three years? If so, please describe the planned improvements and the expected date of undertaking?

Was there a 5% or greater increase in annual operating costs in the past 12 months? If so, please explain as to why.

Taxes and Revenue

Are the property taxes up to date? If not, please explain why.

Is there an anticipated change in ownership in the next 12 months? If yes, please explain why.

Is the property in good standing with all investors? If no, please explain why.

Is the property planning to increase rents for HOME units in the next 12 months? If so, please fill out the rent and utility allowance approval form.

Is the property planning to increase rents for non-HOME units in the next 12 months? If so, please provide the rent increase information.

Completed by (name and title):

Date: