



## CALIFORNIA TAX CREDIT ALLOCATION COMMITTEE

---

915 Capitol Mall, Suite 485  
Sacramento, CA 95814  
p (916) 654-6340  
f (916) 654-6033  
[www.treasurer.ca.gov/ctcac](http://www.treasurer.ca.gov/ctcac)

**MEMBERS**  
FIONA MA, CPA, CHAIR  
State Treasurer

MALIA M. COHEN  
State Controller

JOE STEPHENSHAW  
Director of Finance

GUSTAVO VELASQUEZ  
Director of HCD

TIENA JOHNSON HALL  
Executive Director of CalHFA

**EXECUTIVE DIRECTOR**  
NANCEE ROBLES

DATE: January 30, 2023

TO: Low Income Housing Tax Credit Project Management Companies

FROM: California Tax Credit Allocation Committee – Compliance Section

RE: Annual Owners Certification Package for Reporting Year 2022 – Part I

The California Tax Credit Allocation Committee (CTCAC) is pleased to announce that the Annual Owners Certification (AOC) Package is now available on its website at:  
<http://www.treasurer.ca.gov/ctcac/compliance/aoc/index.asp>.

For the Year 2022 reporting, the Annual Owners Certification (AOC) package will continue to consist of four (4) reports: Annual Owners Certification (AOC) form, Project Ownership Profile (POP) form, Annual Operating Expense (AOE) form and the Lender Profile (LP) form. One submission of the AOC package per property is required for projects in the initial federal 15-year compliance period, as well as those in the extended-use period. The package will be divided into two parts, with two distinct submission dates, as follows:

### **The 2022 AOC Package Part I - Due April 3, 2023:**

- AOC Form **(email via PDF, one form per project),**
- POP Form (email via *Excel*, one project per workbook)  
**\*Please DO NOT include AOC attachments and POP attachments in the same email. They must be emailed separately.**
- Part I Submission
  - Owners of projects:
    - **Email** the AOC form(s) to [TCAC@treasurer.ca.gov](mailto:TCAC@treasurer.ca.gov)

- i. The AOC email **MUST HAVE**:
    - 1. Contact name of person completing form(s)
    - 2. Subject title of email: **2022 AOC(s) – Part I**
  
  - ii. The AOC form **MUST HAVE**:
    - 1. Project name from AOC drop down list
    - 2. Notary
- Email the POP form(s) to [TCAC@treasurer.ca.gov](mailto:TCAC@treasurer.ca.gov)
    - i. The POP form **MUST**:
      - 1. **BE FILLED OUT COMPLETELY – \*BLANK FIELDS WILL CAUSE REJECTION OF ENTIRE POP\***
      - 2. **BE IN THE FORM OF AN EXCEL FILE. POP's sent in the form of a PDF or any form other than Excel will be immediately rejected.**
      - 3. Have a subject title of: **2022 POP(s)**

**The 2022 AOC Package Part II – Due on June 5, 2023**

- Part II Submission

- The AOE and LP forms will be available online on or after April 3, 2023

If you have any questions or problems downloading or submitting the AOC package Part I, please contact Julio Villanueva by email at [Julio.Villanueva@treasurer.ca.gov](mailto:Julio.Villanueva@treasurer.ca.gov).

Any questions downloading or submitting the AOC package Part II, please contact Jerry Yang by at [Jerry.Yang@treasurer.ca.gov](mailto:Jerry.Yang@treasurer.ca.gov).