

GREAT Compliance Training

TheoPRO is serious about its mission to provide **GREAT** training that explains complex concepts in an understandable, engaging format.



ThePRO training events are **FUN and educational!**

Currently Available Courses

Check our website often for public seminars offerings, or to schedule your public training. Also watch for on-demand training opportunities coming soon!

TheoPRO1: Determining Eligibility

1 day course

A course on how to qualify applicants for Section 42 housing.

TheoPRO1.5: Ready, Set, Go!

2 day course

This tax credit basics enhanced course will cover all of TheoPRO 1 and will include several workshops and a discussion of site processing procedures in order to enable site staff to be more effective.

TheoPRO2: Tax Credit Comprehensives

1 1/2 day course

A concise and practical overview of all aspects of Section 42. *This course is a must for any tax credit professional seeking an industry certification.* *

**TheoPRO is proud to be approved to train for both the HCCP and the SHCM Certifications. Call for details.*

TheoPRO3: Compliance Science

Variable course

Only available as a private training. This course prepares management agents for TheoPRO's file pre-approval process and also teaches appropriate procedures for any compliance department.

TheoPRO4: Mixed Income Tax Credit Properties

1/2 day course

Many tax credit properties contain both low-income and market rate units. The procedures necessary to succeed at this special type of property are taught in detail.

TheoPRO5: The Successful Integration of Section 42 with Inhabited Multi-family Properties

1 day course

The first half of the day is spent discussing the basic foundations of the acq/rehab process. The second half of the day is specific to the challenges of converting Section 8, 236, and RD properties into Section 42. (Formerly TheoPRO 5/10)

TheoPRO6: Mixed Finance Developments

1 day course

This course deals with combining Section 42 with Tax-Exempt Bond Financing and/or HOME Funding.

TheoPRO8: The First Year of the Credit Period

1/2 day course

A new tax credit property faces special challenges in the first year with difficult consequences. Whether new construction or acq/rehab, ignorance is not bliss! Learn the vital information you need to succeed.

TheoPRO9: What's Next?

1/2 day course

The first year of the credit period has ended. This course prepares owners and managers for the challenges they will face after the first year. Consider this course 'Survival Tactics for Years 2-??'

Quotes from Classes

"The instructor made tax credits fun and easier to understand. GREAT job"

"GREAT information and GREAT delivery"

GREAT Preparation for New Section 42 Developers/Managers

Prepare 42

Owners lose thousands and thousands of dollars in the first year of the credit period often due to situations beyond their control, but just as often due to a lack of information and direction...things that can be controlled.

Wouldn't it be nice if an owner or manager with a new tax credit property could get a professional opinion of their project, it's required lease-up schedule, and a review of the market before lease-up begins...and at an affordable price?



Are you concerned about the success of your new tax credit development? You need **Prepare 42!**

Here's what you receive:

- ★A review of Section 42 restrictive covenants
- ★A review of the market study
- ★A review of the performance guarantees
- ★A plan to meet Section 42 compliance regulations
- ★A plan to approach the market
- ★A plan to meet performance guarantees

Can we be greater?

Add Prepare42 PLUS service and receive:

- ★A review of the compliance manual
- ★Free TheoPRO X-Act forms
- ★Review of your current forms
- ★Free pre-approval of the first ten files!

But, what's the greatest thing we can do?

Add Prepare42-Excel and receive within 90 days after lease-up begins:

- ★A one-day visit, including a site visit, and a market condition update
- ★A third party discreet shop of your leasing staff
- ★25% off of a TheoPRO one-day training event!

"If only we had known then what we know now."
(A new developer to Section 42)



But Wait...There's More!

GREAT File Auditing

Knowing the status of your files is important. Only experienced professionals with full credentials should audit these valuable records.

The **GREATEST** thing that TheoPRO can do for you is to make certain that their auditing staff is knowledgeable and experienced. *New auditors for TheoPRO must work under the guidance of a senior auditor for a minimum of 6 months and pass TheoPRO's exam requirements before they are released to work on files independently.*

"TheoPRO staff caught things that made our job as state auditors easier to do. And the staff took care of them before we arrived to do our inspection! Thank you TheoPRO!"
(Comment by a state agency compliance auditor)



Are you bogged down with too much paperwork?

GREAT File Pre-Approval Services

Having a third party look at files prior to move-in is an important preventive measure that protects tax credits. When hiring a company for preapproval services, *knowledge, experience, courtesy and timely response is the key.*

TheoPRO handles each file within 2 working days. 1 working day with our X-PRESS Service option!

"We have learned to do everything the TheoPRO way. No one moves in until TheoPRO approves the file."

GREAT Forms



X-ACT Forms

TheoPRO's X-Act Forms are unique. Not only do they clearly conform to HUD and Section 42 requirements, they also provide calculations instructions for managers on the reverse side of most forms.

Can't afford software? Let ThePRO's X-ACT forms take the mystery out of the verification and calculation process!

"We think you'll find TheoPRO "X-Act" forms the easiest to use and the most comprehensive in the Section 42 industry!"
(Ruth Theobald Probst)

- ★ Easy to digest instructions to third party.
- ★ Anti-anxiety calculation instructions in simple language on most forms.
- ★ TheoPRO "X-ACT" Forms cover all HUD/IRS requirements for income and asset verifications, and are updated when rules change.

Go to www.icomply42.com for a complete list of these forms along with pricing information. Order your set today and personalize them for all of your tax credit communities!

XL-Cert



TheoPRO is pleased to announce its simply amazing automated Income Certification, the XL-Cert (based on the NCSHA Tenant Income Certification).

Designed by TheoPRO staff, this user-friendly certification format makes the work of completing the Tenant Income Certification fun and easy with 'autocalc' cells that accurately configure vital calculations.

Tired of adding tape totals together? Tired of correcting accidental errors from transposed numbers? Tired of checking and rechecking your own math? If you want to excel at Section 42, you need the XL-Cert!

GREAT Weekly On-Line Advisor Service



...Don't Keep It A Secret!!!

How many compliance consultants do you know who provide **weekly advice for 48 weeks of the year?**

Where do you turn when you need to know immediately about developments in tax credit regulations?

Join the thousands of subscribers to this service.



EXPERIENCE GREATNESS WITH THEOPRO!



GREATNESS

In Compliance



Products and Services Brochure

TheoPRO
Compliance & Consulting, Inc.

"Setting THE Standard for Compliance Excellence"

1-877-783-1133
www.icomply42.com