

MODEL LETTER

Ask Owner for Documents You Need

Here's a letter you can adapt and use to ask the owner for all the documents you need to manage your site effectively. The letter mentions the specific documents and asks the owner for copies.

Oct. 1, 2012

Joan Smith, Member
ABC Owners Company LLC
123 Main St.
Anytown, USA 12345

Re: ABC Apartments

Dear Ms. Smith:

This is a request for certain documents that will allow XYZ Management to manage ABC Apartments effectively and comply with all tax credit program requirements. They are:

- All IRS Forms 8609 for the site;
- The Land Use Restriction Agreement or Extended Use Restriction Agreement (if your building was allocated credits after 1989);
- Any financing agreements you have signed to obtain extra funding for the site; and
- Your application to the state housing agency for a reservation of tax credits.

We would appreciate your sending copies of these documents at your earliest convenience. We do not need originals.

Thank you. If you have any questions, do not hesitate to call me at (123) 456-7890.

Sincerely,
John Smith
XYZ Management