

AFFORDABLE HOUSING EXEMPTION REQUEST FOR IMPACT FEES
Polk County, FL

1. Owner name: _____
2. Owner address & phone number: _____
3. Builder name: _____
4. Builder address & phone number: _____
5. Site location (physical address) _____
6. Range: _____ Township: _____ Section: _____
Parcel # (s): _____

A COMPLETE LEGAL DESCRIPTION OF THE PROPERTY IS REQUIRED TO BE ATTACHED TO THIS APPLICATION

7. Project will be: SOLD RENTED
8. Proposed selling price or rental price for each unit: _____
9. Is this project the recipient of any governmental grant or subsidy which will fund the construction: YES NO
If YES, please attach copy of terms, restrictions, and conditions of the grant or subsidy. FMHA applicants need to attach a Conditional Commitment.
10. Evidence that the residential construction shall be occupied by low income persons or very low income persons. (Please complete a Resident Income Certification application).
11. Evidence that the Residential Construction is part of a multi-family project, which is funded by a governmental affordable housing program, if applicable.

For residential construction to receive an Affordable Housing Exemption, it must meet all the restrictions of Affordable Housing as provided in Polk County Ordinance 019-056, as amended, and these restrictions must continue for a period of at least seven (7) years from the date of issuance of a Certificate of Occupancy. Such restriction must either be contained within the deed for the residential construction; the terms, restrictions and conditions of a direct government grant or subsidy that will fund the residential construction; or within the terms of a development agreement between the County and the Owner.

CERTIFICATION FROM PROPERTY OWNER OR AUTHORIZED REPRESENTATIVE

I, _____, certify that the above information is correct and complete to the best of my knowledge. I, the undersigned, also certify that I have read and understand Section 2.06, item 7, Affordable Housing Exemption, as contained in the Polk County, Florida, Amended, Restated and Consolidated Comprehensive Impact Fee Ordinance #19-056, as amended.

Signed: _____

STATE OF FLORIDA
COUNTY OF POLK

The foregoing instrument was acknowledged and sworn before me by means of _____ physical presence or _____ online notarization, this _____ day of _____, 20____, by _____ who is _____ personally known to me, or _____ has produced _____ as identification.

(AFFIX SEAL)

Notary Public: _____
Print Name: _____

Transportation, EMS, Correctional, School; APPROVED DENIED
Library, Parks, Fire Rescue & Law Enforcement Fees when applicable

County Management signature: _____ Date: _____

Return completed form to: Polk County Office of Planning & Development
Drawer GM01, P. O. Box 9005
Bartow, FL 33831-9005

POLK COUNTY OFFICE OF PLANNING & DEVELOPMENT

HOUSING IMPACT FEE MITIGATION

DOCUMENTATION CHECKLIST

NAME _____ DATE _____

- Completed , signed **Resident Income Certification** application
- Completed, signed, typed **Uniform Residential Loan Application** (Fannie Mae Form 1003)
- Paystubs - two (2) **MOST RECENT**
- Current **Verification of Employment (VOE)** for each Adult Household Member
- Income Verification for **ALL** Family Members receiving income such as; Social Security, SSI, AFDC, Child Support (must be reported Court Ordered or Not), Alimony, Pension or Retirement
- Self Employed - Prior Year Tax Return
- Copy of last six (6) months Bank Statements on all Checking and Savings Accounts
- Copy of **Driver's License** for all heads/co-heads of household (Borrowers and non-borrowers)
- Copy of **Social Security Cards** for all persons to reside in home
- All Certifications must be Notarized** (Impact Fee Mitigation Request Application Coverpage, Legal Homestead, Qualified Construction)

NOTE: PLEASE submit completed documents to avoid delays. THANK YOU!!

Purchaser Certification

RE: BUYER: _____

ADDRESS: _____

PARCEL: _____

TO WHOM IT MAY CONCERN:

I hereby certify that the residential construction on the above referenced property I am purchasing will be my legal homestead.

I, _____, certify that the above information is correct and complete to the best of my knowledge.

Signed: _____

STATE OF FLORIDA
COUNTY OF POLK

The foregoing instrument was acknowledged before me by means of _____ physical presence or _____ online notarization, this _____ day of _____, 20____, by _____, who _____ is personally known to me or _____ has produced _____ as identification.

(AFFIX NOTARY SEAL)

Notary Public

Print Name _____

My Commission Expires _____

Affidavit Affirming Construction – Affordable

RE: BUYER: _____

ADDRESS: _____

PARCEL: _____

TO WHOM IT MAY CONCERN:

I hereby certify that the residential construction on the above referenced property qualifies as Affordable Housing and will be occupied by low or very low income person(s) as shown in the attached Resident Income Certification application.

I, _____, certify that the above information is correct and complete to the best of my knowledge.

Signed: _____

STATE OF FLORIDA
COUNTY OF POLK

The foregoing instrument was acknowledged before me by means of _____ physical presence or _____ online notarization, this _____ day of _____, 20____, by _____, who _____ is personally known to me or _____ has produced _____ as identification.

(AFFIX NOTARY SEAL)

Notary Public
Print Name _____

My Commission Expires _____

POLK COUNTY IMPACT FEE WAIVER REQUEST FORM
RESIDENT INCOME CERTIFICATION - HOME BUYER - RENTAL HOUSING
AFFORDABLE HOUSING

Effective Date: _____

Affordable Housing shall mean a Dwelling Unit which is offered for sale or rent to Low-Income Persons or Very-Low-Income Persons and which monthly rent or monthly mortgage payments, including taxes and insurance, do not exceed 30 percent of that amount which represents the percentage of the median adjusted gross income for **Low-Income Persons and Very-Low-Income Persons**.

A. Recipient Information (select one)

a. Home Buyer: Monthly PITI: _____ Rent Monthly: _____

B. Subsidy Use New Construction

Affordable Housing Funds Committed by: _____

Name of Home Buyer/Renter:
Address of Property:

C. Household Information

Member	Name(s) - All Household Members	Relationship	Age
1			
2			
3			
4			
5			
6			
7			

D. Assets: All household members including minors

Member	Asset Description	Cash Value	Income from Assets
1		\$	
2		\$	
3			
4			
5			
Total Cash Value of Assets		D(a) \$	
Total Income from Assets		D(b)	\$
If line D(a) is greater than \$5,000, multiply that amount by the rate specified by HUD (applicable rate 2.0%) and enter results in D(c), otherwise leave blank.		D (c)	\$

E. **Anticipated Annual Income:** Includes unearned income and support paid on behalf of minors.

Member	Wages/ Salaries (Include tips, commission, bonuses, etc.)	Benefits/Pensions	Public Assistance	Other Income	Asset Income (Enter the greater of box D(b) or box D(c) above In box E(e) below: (e)
1	\$	\$	\$	\$	
2					
3					
4					
5					
6					
7					
	(a)	(b)	(c)	(d)	
Totals	\$	\$	\$	\$	\$

Enter total of items E(a) through E(e). This amount is the ANNUAL ANTICIPATED HOUSEHOLD INCOME	\$
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F. **Recipient Statement:** The information on this form is to be used to determine maximum income for eligibility. I/we have provided, for each person set forth in Item C, acceptable verification of current and anticipated annual income. I/we certify that the statements are true and completed to the best of my/our knowledge and belief and are given under penalty of perjury. **WARNING:** Florida Statute 817 provides that willful false statements or misrepresentation concerning income and assets or liabilities relating to financial condition is a misdemeanor of the first degree and is punishable by fines and imprisonment provided under S 775.082 or 775.83.

Signature of Head of Household

Date _____

Signature of Spouse or Co-Head of Household

Date _____

G. **Administrator Statement:** Based on the income information provided by the household and upon proofs and documentation submitted, the household is eligible for Polk County Impact Fee Waivers, the family or individual(s) constitute(s) a: (check one)

_____ **Low Income (LI) Persons** shall mean one or more natural persons, the total adjusted gross household income of which does not exceed **80% of the median adjusted gross income for households** within the Lakeland-Winter Haven, Florida, metropolitan statistical area as reported by the U.S. Department of Housing and Urban Development or its governmental successor in function. **Maximum income limit* \$** _____

_____ **Very Low Income (VLI) Persons** shall mean one or more natural persons, the total adjusted gross household income of which does not exceed **50% of the median adjusted gross income for households** within the Lakeland-Winter Haven, Florida, metropolitan statistical area as reported by the U.S. Department of Housing and Urban Development or its governmental successor in function. **Maximum income limit* \$** _____

*Based upon the _____ (year) income limits for Lakeland-Winter Haven Metropolitan Statistical Area (MSA) or Polk County,

Florida. **Program Administrator or His/Her Designated Representative:**

(Signature)

Date _____

Name _____
(Print or type name)

Title _____

Prepared by and return to:

CLAIM OF LIEN—AFFORDABLE HOUSING IMPACT FEE WAIVER

Owner-Occupied or Rental
(Polk County, Florida)

To: _____, owner(s) of the premises hereinafter described, their successor(s)-in-title and permitted assign(s) (the “Owner”), and to all interested parties who may be concerned:

You are hereby notified that Polk County, Florida, (the “County”) hereby claims a lien upon the following described property:

Parcel ID: _____

LEGAL DESCRIPTION:

together with all improvements thereon (the “Property”), which received a certificate of occupancy on _____, (the “Lien Commencement Date”). At that time, \$_____ (the “Assessed Impact Fees”) was owed to the County for impact fees imposed pursuant to the Amended and Restated Comprehensive Impact Fee Ordinance (Ordinance No. 2019-056), as amended (the “Impact Fee Ordinance”). The Assessed Impact Fees are detailed in the impact fee schedule set forth in Exhibit “A” attached hereto and incorporated herein.

Owner applied for an exemption to the Assessed Impact Fees through the Affordable Housing process pursuant to Section 2.06(A)(7) of the Impact Fee Ordinance. This request was approved by the County. Pursuant to the Impact Fee Ordinance, the Owner was deemed eligible to receive an exemption to the Assessed Impact Fees.

Wherefore, Polk County hereby claims a lien upon said Property in the amount of \$_____ for the Assessed Impact Fees that were exempted through the Affordable Housing process.

This lien is recorded pursuant to Section 2.06(A)(7) of the Impact Fee Ordinance. In the event the Property is transferred to another owner who does not satisfy the criteria for the Affordable Housing Impact Fee Exemption set forth in Section 2.06(A)(7) of the Impact Fee Ordinance during the seven (7) year period following the Lien Commencement Date, the full amount of Assessed Impact Fees shall be immediately due and payable to the County. Such lien shall have priority over all other liens except for taxes and other governmental liens and assessments.

POLK COUNTY, FLORIDA, as Lienor

Name: _____
Title: Deputy County Manager

STATE OF FLORIDA
COUNTY OF POLK

The foregoing instrument was acknowledged before me by means of physical presence or online notarization this _____ day of _____, 202__, by _____ as Deputy County Manager, on behalf of Polk County, Florida. Such person is personally known to me or who has produced _____ as identification.

Notary Public, State of Florida
Print Name: _____
Commission No.: _____
Commission Expires: _____

PROPERTY OWNER(S):
Acknowledged and agreed to:

Printed Name:

Printed Name:

STATE OF FLORIDA
COUNTY OF POLK

The foregoing instrument was acknowledged before me by means of physical presence or online notarization this _____ day of _____, 202__, by _____ who produced _____ as identification.

Notary Public, State of Florida
Print Name: _____
Commission No.: _____
Commission Expires: _____