



**COMMUNITY STABILIZATION AND FAIR RENT ACT (CSFRA)
 PETITION PACKET FOR UPWARD ADJUSTMENT OF RENT
 CHECKLIST**

Landlords petitioning for an upward adjustment of rent under the CSFRA can use this checklist to assist them when completing the petition. This checklist is not mandatory and is only intended as an aid.

| Initial Checklist | | | | |
|--|--------------------------|--------------------------|--------------------------|----------|
| Question | Y | N | N/A | Comments |
| Does packet appear complete? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Does owner information appear complete? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Does <i>Representative Authorization Form</i> appear complete (if applicable)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Are all necessary signatures provided? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Are the following attachments included (if applicable): | | | | |
| <i>Representative Authorization Form (if applicable)?</i> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| <i>Notice of Submission to Tenants and Proof of Service Form?</i> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| <i>Rent Roll?</i> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |

| Detailed Checklist | | | | | |
|--------------------|--|--------------------------|--------------------------|--------------------------|----------|
| Page | Section | Complete? | | | Comments |
| | | Y | N | N/A | |
| 1 | I. General Information | | | | |
| | Is owner information complete? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Is representative information provided? (if applicable) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 2 | II. Property Information | | | | |
| | <i>Is the following information provided:</i> | | | | |
| | Property's address? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Parcel ID number? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |



| Detailed Checklist | | | | | |
|--------------------|---|--------------------------|--------------------------|--------------------------|----------|
| Page | Section | Complete? | | | Comments |
| | | Y | N | N/A | |
| | Purchase date? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Purchase price? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Total number of units on property? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Number of units affected? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 2 | III. Base Year and Petition Year | | | | |
| | <i>Is the base year specified?</i> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | If the base year is NOT 2015, did you provide an explanation provided in WS 6? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Is the Petition Year indicated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 2 | IV. Income and Expense Summaries and Calculation of Net Operating Income | | | | |
| | Are the income and expense summaries for three years preceding the petition attached? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Is the Calculation of Net Operating Income attached (Worksheets 4 and 5)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 3 | V. Request for Prehearing Settlement Conference | | | | |
| | Is the preference for a prehearing settlement conference noted? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| 3 | Declaration | | | | |
| | Are the necessary signature(s) provided? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| WS 1A | Rent History (Mandatory) | | | | |
| | <i>Is the following information provided:</i> | | | | |
| | Information provided for all units? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Unit number or other ID number? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Number of bedrooms/bathrooms? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Move-in date? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |



| Detailed Checklist | | | | | |
|--------------------|---|--------------------------|--------------------------|--------------------------|----------|
| Page | Section | Complete? | | | Comments |
| | | Y | N | N/A | |
| | Monthly rent on move-in date? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Date of last rent increase? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Last monthly rent increase amount/percent (%)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Current rent? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Effective date of proposed rent increase? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Proposed monthly rent increase amount/percent (%)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| WS 1B | Explanation of Relevant Facilities, Housing Services and Allocation of Utility Costs (Mandatory) | | | | |
| | <i>Is the following information provided:</i> | | | | |
| | Information provided for all units? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Description of facilities available at rental property? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Housing services available at rental property? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Allocation of utility costs between owner and tenants and between each rental unit? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| WS 2 | Adjusted Gross Income (Mandatory) | | | | |
| | <i>Is the following information provided:</i> | | | | |
| | Base Year information? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Petition Year information? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Adjusted Gross Income calculated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| WS 2.1 | Vega Adjustment | | | | |
| | <i>Is the following information provided (if applicable):</i> | | | | |
| | Information provided for all units? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | 2015 HUD FMR number used? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |



| Detailed Checklist | | | | | |
|--------------------|---|--------------------------|--------------------------|--------------------------|----------|
| Page | Section | Complete? | | | Comments |
| | | Y | N | N/A | |
| | Total rent received for 2015 calculated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Vega adjusted total rent for 2015 calculated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| WS 3 | Operating Expenses (Mandatory) | | | | |
| | <i>Is the following information provided:</i> | | | | |
| | Base Year information? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Petition Year information? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Total operating expenses calculated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| <i>WS 3</i> | <i>Is the following documentation attached?</i> | | | | |
| | Business License Fees? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Real Property Taxes? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Utility costs? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Insurance? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| <i>WS 3</i> | <i>Is the following documentation attached and labelled by line item?</i> | | | | |
| | Reasonable Costs for Ordinary Repairs (Worksheet 3.1 A – Base Year)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Receipts/documentation (Worksheet 3.1 A – Base Year)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Reasonable Costs for Ordinary Repairs (Worksheet 3.1 B – Petition Year)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Receipts/documentation (Worksheet 3.1 B – Petition Year)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Reasonable Management Expenses (6% or Worksheet 3.2)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| <i>WS 3</i> | <i>Is the following documentation attached and labelled by line item if applicable?</i> | | | | |
| | Reasonable Capital Improvement Costs (Worksheet 3.3)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Receipts/documentation (Worksheet 3.3)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |



| Detailed Checklist | | | | | |
|--------------------|---|--------------------------|--------------------------|--------------------------|----------|
| Page | Section | Complete? | | | Comments |
| | | Y | N | N/A | |
| | Allowable Attorney's Fees? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Owner Performed Labor (Worksheet 3.4)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Other Operating Expenses (Worksheet 3.5)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Receipts/documentation (Worksheet 3.5)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Costs related to increases or decreases in number of tenants, living spaces etc.? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Costs related to substantial deterioration of rental unit? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Consideration for Unusually High or Low Operating Expenses (Worksheet 3.6)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Receipts/documentation (Worksheet 3.6)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| WS 3.1 A | Ordinary Repair, Replacement and Maintenance – Base Year (Mandatory) | | | | |
| | <i>Is the following information provided:</i> | | | | |
| | Expense information? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Evidence of repairs provided? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Line item(s) indicated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Total Sum of All Costs calculated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| WS 3.1 B | Ordinary Repair, Replacement and Maintenance – Petition Year (Mandatory) | | | | |
| | <i>Is the following information provided:</i> | | | | |
| | Expense information? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Evidence of repairs provided? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Line item(s) indicated on attached documents? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |



| Detailed Checklist | | | | | |
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| Page | Section | Complete? | | | Comments |
| | | Y | N | N/A | |
| | Total Sum of All Costs calculated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| WS 3.2 | Reasonable Management Expenses (Mandatory Unless Using 6% Calculation) | | | | |
| | <i>Is the following information provided:</i> | | | | |
| | Expense information? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Receipts/documentation provided? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Line item(s) indicated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Total Management Expense calculated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Percentage of Annual Gross Income calculated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| WS 3.3 | Capital Improvements (if applicable) | | | | |
| | <i>Base Year</i> | | | | |
| | <i>Is the following information provided:</i> | | | | |
| | Expense information? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Receipts/documentation provided? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Line Item(s) indicated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Amortization Period indicated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Total Sum of All Costs calculated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | <i>Petition Year</i> | | | | |
| | <i>Is the following information provided:</i> | | | | |
| | Expense information? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Receipts/documentation provided? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Line Item(s) indicated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Amortization Period indicated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Total Sum of All Costs calculated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| WS | Owner Performed Labor (if applicable) | | | | |



| Detailed Checklist | | | | | |
|--------------------|---|--------------------------|--------------------------|--------------------------|----------|
| Page | Section | Complete? | | | Comments |
| | | Y | N | N/A | |
| 3.4 | | | | | |
| | <i>Is the following information provided (if applicable):</i> | | | | |
| | Labor information? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Total Costs calculated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| WS 3.5 | Other Operating Expenses (if applicable) | | | | |
| | <i>Is the following information provided (if applicable):</i> | | | | |
| | Expense information? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Receipts/documentation provided? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Rent roll back documentation (if applicable)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Total Other Operating Expenses calculated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| WS 3.6 | Consideration for Unusually High or Low Operating Expenses (if applicable) (Worksheet 3.6) | | | | |
| | <i>Is the following information provided (if applicable):</i> | | | | |
| | <i>Base Year</i> | | | | |
| | Expense information? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Receipts/documentation provided? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Additional information indicated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Expense(s)/cost(s) calculated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | <i>Petition Year</i> | | | | |
| | Expense information? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Receipts/documentation provided? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Additional information indicated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Expense(s)/cost(s) calculated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| WS 4 | Net Operating Income – NOI (Mandatory) | | | | |



| Detailed Checklist | | | | | |
|--------------------|---|--------------------------|--------------------------|--------------------------|----------|
| Page | Section | Complete? | | | Comments |
| | | Y | N | N/A | |
| | <i>Is the following information provided:</i> | | | | |
| | Base Year information? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Petition Year information? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | NOI calculated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| WS 5 | Calculation of NOI Plus CPI Adjustment (Mandatory) | | | | |
| | <i>Is the following information provided:</i> | | | | |
| | Base Year information? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Petition Year information? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | CPI calculated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | NOI Plus CPI Adjustment calculated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| WS 6 | Additions/Explanations (if applicable) | | | | |
| | Is the worksheet being supplemented indicated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Is the applicable information provided? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| WS 7 | Unavailable Documentary Evidence (if applicable) | | | | |
| | Is the applicable information provided? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| WS 8 | Petitioner's Witness and Expert Witness List (Mandatory) | | | | |
| | Is the preference indicated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Is the witness information provided (if applicable)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| WS 9 | Tenant Contact Information (Mandatory) | | | | |
| | <i>Is the following information provided:</i> | | | | |
| | Name of tenant(s) who are signatory to the rental agreement for each affected unit? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Address of each tenant (including unit number)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |



| Detailed Checklist | | | | | |
|--------------------|--|--------------------------|--------------------------|--------------------------|----------|
| Page | Section | Complete? | | | Comments |
| | | Y | N | N/A | |
| | Telephone number of each tenant (if known)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Email address of each tenant (if known)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| ATT 1 | Authorization Form for Designation of Representative for Petition Process (if applicable) | | | | |
| | <i>Is the following information provided (if applicable):</i> | | | | |
| | Address? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Specific units affected? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Designation of representative indicated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Representative information and signature? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Property owner information and signature? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| ATT 2 | Notice of Submission to Tenants and Proof of Service Form | | | | |
| | <i>Is the following information provided:</i> | | | | |
| | Method of service indicated? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | All applicable units served? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Unit information (name/address)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | Signature? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |