

**PROPERTY TAX MANAGERS.com**  
**PROPERTY TAX SERVICE AGREEMENT**

This Service Agreement (“Agreement”) is entered by and between **PropertyTaxManagers.com** (PTM) and \_\_\_\_\_ (“Taxpayer”). *Taxpayer* agrees to retain PTM for the purpose of providing property tax assessment consultation and for valuation appeal services for the current tax year, and each subsequent year, subject to the terms and conditions of this Agreement.

**Services**

**PTM** agrees to provide *Taxpayer* the following property tax services (“Services”) for the Properties listed in Exhibit A attached:

- Consult with *Taxpayer* and make appeal recommendations based on our findings.
- Meet with local tax officials informally to negotiate a fair and equitable value.
- Appear at the Appraisal Review Board or equivalent board of review, when required.
- Assist in post-board level appeals including litigation, subject to additional agreement.
- Provide reports with assessed values and estimated and/or actual tax amounts.

PTM has not made and does not make any guarantee, representation or warranty as to the results which may be obtained by virtue of the Services. Nothing contained herein shall be deemed or construed in any respect to make PTM liable for payment of any ad valorem taxes against the Properties. The payment of all property taxes and the payment of fees for property tax services shall remain *Taxpayer’s* sole and exclusive obligation.

In rendering the Services, it is understood that PTM must receive the cooperation of *Taxpayer* in receiving, in a timely manner, all necessary information concerning the Properties. These items may include but are not limited to, profit and loss statements, rent rolls, fixed asset schedules, list of deferred maintenance items, market surveys, legal descriptions, closing statements and appraisals. PTM is not responsible for incomplete, inaccurate or otherwise omitted information from the Taxpayer.

PTM shall have no obligation to pursue any appeal of assessed value of the Properties by legal proceedings beyond the determination of an Appraisal Review Board or equivalent local board of review. It is agreed that PTM has the authority to withdraw an appeal where, in PTM’s professional opinion, there is reasonable likelihood that a value would be increased at the local board of review.

**Compensation**

*Taxpayer* agrees to compensate PTM for the Property listed below, a performance fee equal to **FORTY percent (40%)** of the “Tax Savings” achieved. Tax Savings is defined as the difference between “Initial Tax” and “Final Tax”. Initial Tax is defined as initial assessed value times the current tax rate. Final Tax is defined as final assessed value times the current tax rate. In no event shall the fee exceed \$4000 per property.

The fee will be invoiced following notification of results using the most recent tax rate available at the time of invoicing. Payments will be due fifteen (15) days after receipt of invoice with interest to accrue on past due amounts at the rate of one percent (1%) per month.

**Term of Agreement**

This agreement becomes effective upon execution by *Taxpayer* and PTM and shall remain in effect until completion of Services this year and each subsequent year. This Agreement may be terminated by either party upon thirty (30) days prior written notice "for cause" or for any other reason with a sixty (60) day written notice. "For cause" shall be defined as a breach of material covenant or a failure to perform a material obligation of this Agreement in whole or in part. This Agreement shall be governed by and construed according to the laws of the State of Texas and regulated by the Texas Department of Licensing and Regulations, P.O. Box 12157, Austin, TX 78711, (800) 803-9205 or (512) 463-6599, website: [www.license.state.tx.us/complaints](http://www.license.state.tx.us/complaints) .

**Properties Subject To This Agreement**

Property Street Address: \_\_\_\_\_

City: \_\_\_\_\_ County: \_\_\_\_\_ Zip Code: \_\_\_\_\_

*If more than one property please attach list of other properties, including Address, City, and County*

**Acceptance**

IN WITNESS WHEREOF, the parties have executed this Agreement as of the last date set forth below their respective signatures.

**PTM**

By: (Signature) \_\_\_\_\_

\_\_\_\_\_

Name: (Printed Name) \_\_\_\_\_

Rob Wheelock

Date: \_\_\_\_\_

Best Phone Contact: \_\_\_\_\_  
( ) Home, ( ) Office, ( ) Cell

Email Address: \_\_\_\_\_

*You can email this form to: [rob@ptm-tx.com](mailto:rob@ptm-tx.com)*

*You can mail this form to: Property Tax Managers  
P.O. Box 12053  
Dallas, Texas 75225*