



SAMPLE FORMS

The following pages are **samples** of the documents we'll need to get you set up. We believe in transparency and want to make sure you are comfortable with everything, so feel free to contact us if you have any questions or concerns.

On the next three pages you'll see an actual copy of our **Property Tax Service Agreement** that shows the Services we provide, how we are Compensated, our Permission Statement, and the Term of Agreement. All you'll need to do when you sign up is complete the six (6) blanks on page two, and sign Appendix A at bottom of page three (3).

The next two pages (4 and 5) show a sample of the **Appointment of Agent for Property Tax Matters** (*also referred to as 50-162*). It a **required form** that we have to file with the Appraisal Districts before they can discuss your property with us. The form is county specific, so if you own property in more than one county, we'll send you a separate form for each one. We'll complete most of the information. All we'll need, is for you to complete the items in STEP 6 when we send you the real forms.

When you sign up, we may send you an **optional Property Data Information Questionnaire** (*not included here*). If so, feel free to complete it and return it with the forms above.

Any questions or concerns. Feel free to contact me.

Regards,

Rob Wheelock

Property Tax Managers

P.O. Box 12053

Dallas, Texas 75225-0053

(M) 214-212-6910

(O) 214-496-9800 x126

RW@PTM-TX.com

www.PropertyTaxManagers.com

Here's an actual copy of the agreement we'll send you. Pretty simple, in language you can understand.



PROPERTY TAX SERVICE AGREEMENT

This Service Agreement (“Agreement”) is entered by and between **Property Tax Managers** (PTM) and _____ (“*Taxpayer*”). *Taxpayer* agrees to retain PTM for the purpose of providing property tax assessment consultation and for valuation appeal services beginning with 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 Property (s) listed as “Properties Subject to this Agreement” on the attached Appendix A:

- 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 arbitration or litigation, subject to additional agreement.
- Assist *Taxpayer* with tax proration and forecasts.
- Consult with *Taxpayer* and make appeal recommendations based on our findings.

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 each property. 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 by legal proceedings beyond the determination of an Appraisal Review Board or equivalent local board of review, except as mutually agreed in advance. 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 could 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. This is a one-time fee for any tax year in which a reduction is achieved.

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.

Permission Statement

In a continuing effort to keep our fees as low as possible and communicate important property tax information to you, we send our invoices and other timely information of value via email. We promise to limit the number of non-billing emails to 5 per year. It is our policy not to share any personally-identifying material obtained with any third party.

Term of Agreement

This agreement becomes effective upon execution by *Taxpayer* and PTM and shall remain in effect each succeeding year until the property is sold or the agreement is terminated. This Agreement may be terminated by either party upon ten (10) days prior written notice between August 1st and March 31st and forty-five (45) days prior written notice between April 1st and July 31st. 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 Regulation, P.O. Box 12157, Austin, Texas 78711, 1-800-803-9202, 512-463-6599; website: www.tdlr.texas.gov

Property Subject to this Agreement

Please see Appendix A attached.

Acceptance

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

By: (Signature) _____

PTM

Name: (Printed) _____

Rob Wheelock

Effective Date: _____

Best Phone Contact: _____

Home Office Mobile

Email Address: _____

Please note invoices will be sent to this email address from CustomerService@PropertyTaxManagers.com

Referred by: _____

We love referrals, so let us know how you found us!

You can email this form to: Rob@PTM-TX.com

You can mail this form to: Property Tax Managers
P.O. Box 12053
Dallas, TX 75225-0053



Appendix A

#	CAD	Account	Address	Type	ID
1	We'll list your property information here with the proper CAD, Account Number, Property Address, etc.			Residential	1251700

Don't forget to sign here.

Owner Signature: _____

Appointment of Agent for Property Tax Matters

This form is for use by a property owner in designating a lessee or other person to act as the owner's agent in property tax matters. You should read all applicable law and rules carefully, including Tax Code Section 1.111 and Comptroller Rule 9.3044. This designation will not take effect until filed with the appropriate appraisal district. Once effective, this designation will be in effect until the earlier of (1) the date of a written revocation filed with the appraisal district by the owner or the owner's designated agent, or (2) the expiration date, if any, designated below.

In some cases, you may want to contact your appraisal district or other local taxing units for free information and/or forms concerning your case before designating an agent.

County Here (if you own property in multiple County's we need a form for each one)

Appraisal District Name

Date Received (appraisal district use only)

STEP 1: Owner's Name and Address:

Name

Address

City, State, Zip Code

We have to file this form with your local Appraisal District. If you own property in more than one county, we'll send you a separate form for each CAD.

We use our number here so you won't be bothered by calls from the CAD.



214-212-6910

Telephone Number (include area code)

STEP 2: Identify the Property for Which Authority is Granted. Identify all property for which you are granting the agent authority and, unless granting authority for all property listed for you, provide at least one of the property identifiers listed below (appraisal district account number, physical or situs address, or legal description). A chief appraiser may, if necessary to identify the property, request additional information. In lieu of listing property below, you may attach a list of all property to which this appointment applies, denoting the total number of additional pages attached in the lower right-hand corner below.

(check one)

all property listed for me at the above address

the property(ies) listed below:

Appraisal District Account Number

Physical or Situs Address of Property

Legal Description

We'll complete this portion for you.

Appraisal District Account Number

Physical or Situs Address of Property

Legal Description

Appraisal District Account Number

Physical or Situs Address of Property

Legal Description

Appraisal District Account Number

Physical or Situs Address of Property

Legal Description

If you have additional property for which authority is granted, attach additional sheets providing the appraisal district account number, physical or situs address, or legal description for each property.

Identify here the number of additional sheets attached:

STEP 3: Identify the Agent:

Property Tax Managers (Our Agent Code # here)

214-212-6910

Name

Telephone Number (include area code)

P.O. Box 12053

Address

Dallas, Texas 75225-0053

City, State, Zip Code

STEP 4: Specify the Agent's Authority

The agent identified above is authorized to represent me in (check one):

- all property tax matters concerning the property identified
the following specific property tax matters:

The agent identified above is authorized to receive confidential information pursuant to Tax Code Sections 11.48(b)(2), 22.27(b)(2), 23.123(c)(2), 23.126(c)(2) and 23.45(b)(2):

Yes No

I hereby direct, as indicated below, the appraisal district, appraisal review board, and each taxing unit participating in the appraisal district to deliver the documents checked below to the agent identified above regarding the property identified. I acknowledge that such documents will be delivered only to the agent at the agent's address indicated above and will not be delivered to me unless the affected offices choose to send me copies or are otherwise required by law. I understand that these documents can affect my legal rights and that the appraisal district, appraisal review board and the taxing units are not required to send me copies if I direct them to deliver the documents to my agent.

- all communications from the chief appraiser
all communications from the appraisal review board
all communications from all taxing units participating in the appraisal district

STEP 5: Date the Agent's Authority Ends. Pursuant to Tax Code Section 1.111(c), this designation indicated or until a written revocation is filed with the appraisal district by the property owner. A designation may be made to expire according to its own terms but is still subject to revocation by the designated agent. Pursuant to Tax Code Section 1.111(d), a property owner may revoke the designation of an agent on this form, or the property owner in connection with an item of property. The designation of an agent on this form revokes any previous designation of an agent in connection with the same item of property and any previous designations of other agents in connection with the same item of property.

STEP 5 If you put a date ending our authority, you'll have to re-enroll and may miss out on potential savings. We prefer that you leave it blank. If you have a concern, please see Term of Agreement on our Property Tax Service Agreement.

Date Agent's Authority Ends Please Leave Blank

STEP 6: Identification, Signature, and Date:

sign here

Signature of Property Owner, Property Manager or Other Person Authorized to Act on Behalf of the Property Owner*

Date

print here

Printed Name of Property Owner, Property Manager or Other Person Authorized to Act on Behalf of the Property Owner

Title

The individual signing this form is (check one):

- the property owner
a property manager authorized to designate agents for the owner
other person authorized to act on behalf of the owner other than the person being designated as agent

* This form must be signed by the property owner, a property manager authorized to designate agents for the owner or other person authorized to act on behalf of the owner other than the person being designated as agent. If you are a person other than the property owner, the appraisal district may request a copy of the document(s) authorizing you to designate agents or act on behalf of the property owner.

If you make a false statement on this form, you could be found guilty of a Class A misdemeanor or a state jail felony under Penal Code Section 37.10.