



Unparalleled Success
During Taxing Times

Want the highest possible property tax savings? You need the best strategy!

Working with our team of experts is like having an in-house property tax department available at your fingertips. We are committed to fostering open lines of communication to understand your expectations and tailor our services to meet your business' needs.

SPECIALIZED SERVICES INCLUDE:

- ✓ Real property tax management
- ✓ Business personal property tax management
- ✓ Identifying incentives and exemptions that may have been overlooked
- ✓ Researching and analyzing comparable properties to provide protest recommendations
- ✓ Reviewing and working to achieve fair property tax valuations
- ✓ Preparing an annual property tax summary report
- ✓ Professional and assertive representation throughout the hearing process
- ✓ Providing litigation support and expert advice on judicial appeals when necessary



We are proud to represent nearly 20 banks and credit unions with real and personal property assets totaling over **\$377 million.**

Commercial Property Tax Services

Property Tax Experts You Can Count On

SWBC Ad Valorem Tax Advisors understands the unique factors of the commercial real estate market and the changing dynamics of its regulatory environment. As property taxes continue to increase year after year, having aggressive property tax representation throughout the whole process is increasingly important.

OUR TEAM HAS EXPERTISE WITHIN ALL CATEGORIES OF COMMERCIAL PROPERTY, INCLUDING:



Agricultural/Wildlife properties



Auto dealerships



Business personal property



Entertainment theme parks



Hospital/Medical properties



Hotels, Destination Resort, Hospitality



Industrial and warehouse assets



Multi-family developments



Office buildings



Real property



Retail centers



Storage facilities

In 2020, businesses paid **\$839 billion** in state and local taxes. Of this, \$330 billion was for property taxes!¹

Let our experts complete a no-cost, comprehensive review of your property taxes and find out if you can save money on your business' property taxes.

Visit us at swb.us/commercial-property-tax to learn more about how we can help.

¹<https://taxfoundation.org/2023-state-business-tax-climate-index/#Property>



EXCEPTIONAL RESULTS PROVIDED BY OUR EXPERT TEAM

We focus on creating and implementing optimal ad valorem tax strategies that will result in the highest possible property tax savings. Our team is dedicated to ensuring you know where we are in the preparation and protest process every step of the way.

As a client, you gain access to our specialized services and support:

- ✓ Identifying incentives and exemptions that may have been overlooked
- ✓ Preparing an extensive valuation analysis to tell the full story
- ✓ Professional and aggressive representation throughout the hearing process
- ✓ Analyzing reports to find any inaccurate or missed inventory and fixed assets
- ✓ Conducting a comprehensive abnormal (functional and economic) obsolescence audit
- ✓ Providing litigation support and expert advice on potential property value agreements



Industrial Complex Property Tax Services

One-Of-A-Kind Resources—Always Prepped for Success

SWBC Ad Valorem Tax Advisors understands that extensive knowledge of the unique issues present and solid comprehension of the evaluation process is the key to a successful property tax reduction in industrial complex industries. The foundation of our comprehensive and individualized negotiation strategies is detailed and accurate research.

We can provide expertise in the following industrial complex industries:



Energy



Marine



Media



Manufacturing & Distribution



Did you know businesses in the U.S. are able to recover on average **100%** of investment costs in machinery, **63.3%** in intangibles, and **35%** for buildings?²



Our team achieved a **\$113 million** reduction for businesses in the state of Louisiana.

We understand how time-consuming and tedious it is compiling data, information, and other pertinent files for filing a property tax protest. Partnering with SWBC's team of expert tax advisors can help streamline your annual property tax process by alleviating some of the stress that comes with gathering important information.

If you're interested in learning more about our specialized services, visit our website swb.us/industrial-property-tax.

²<https://taxfoundation.org/capital-allowances-capital-cost-recovery-2021/>



Residential Property Tax Protest Services

Lower your annual property tax bill by leveraging our resources and specialized experts

SWBC Ad Valorem Tax Advisors knows first-hand the amount of research and time it takes to compile all of the necessary data and documents needed for a successful protest on your annual property valuation. Every year, homeowners experience a moment of shock when property tax appraisals are mailed out stating the latest assessed home value. Our team has access to the tools and knowledge needed to help you reduce the appraised value of your home, and ultimately, lower your annual tax bill.

GIVE YOURSELF A FIGHTING CHANCE. HIRE AN EXPERT!

By maintaining a clear understanding of the local real estate market and the dynamics that affect its regulatory environment, we are able to help reduce your property tax values by aggressively protesting them at appeal hearings.

Our clients gain access to our comprehensive tax protest services:

- ✓ Review and evaluate the appraisal district valuation
- ✓ File absolute and partial exemptions and incentives
- ✓ Conduct market research and analysis on similar properties to provide protest recommendations
- ✓ Professional and aggressive representation throughout the hearing process
- ✓ Provide litigation support and expert advice on judicial appeals when necessary

Working with SWBC's experienced team of property tax advisors means you will have an expert advocate on your side to help you through the property tax protest process. Don't let the next protest filing deadline pass you by again!

Get started today by visiting us at swb.us/residential-property-tax.

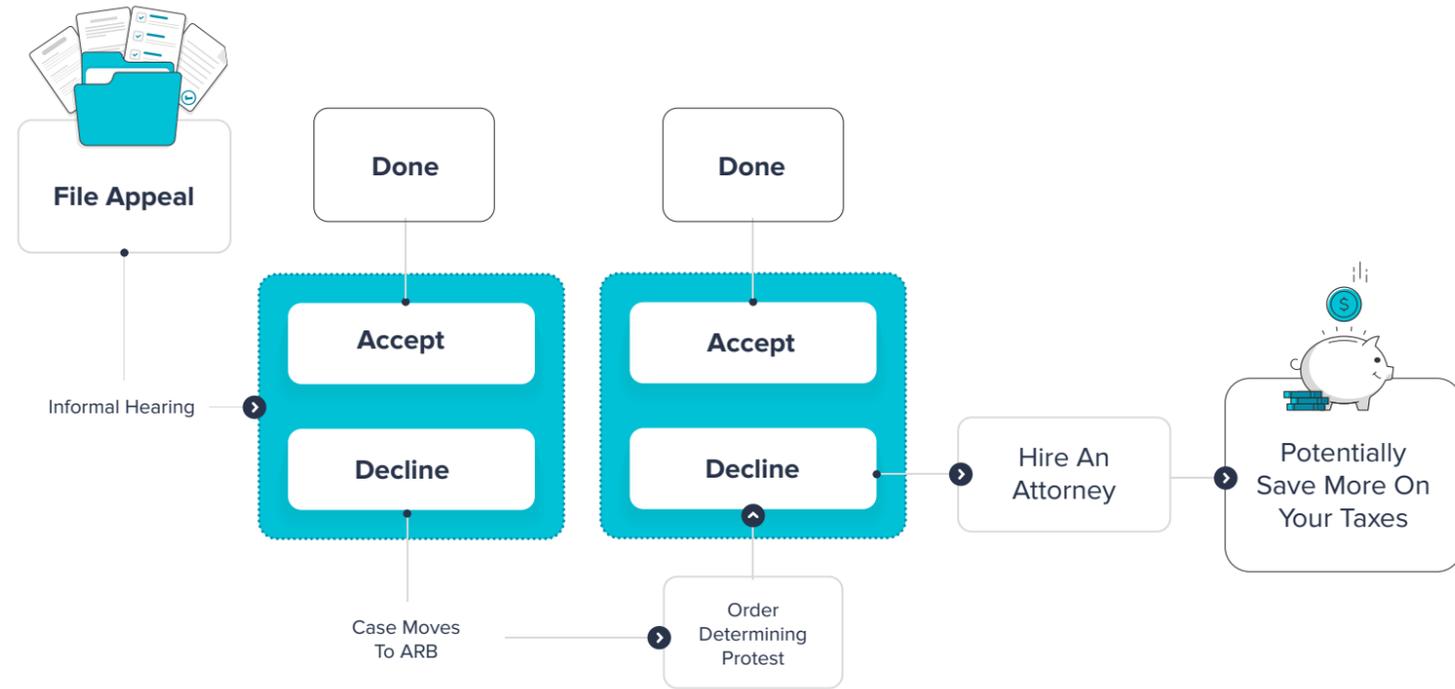


In 2021, over **59%** of the more than 1.2 million single-family residential property owners that filed a property tax protest **reached a resolution in the informal hearing process.**³

³<https://comptroller.texas.gov/taxes/property-tax/docs/operations-survey-data-2021.xlsx>

Additional Resources

Know the Process



TEXAS PROPERTY TAXPAYER BILL OF RIGHTS:

You have the **right** to equal and uniform taxation.

You have the **right** to inspect non-confidential information used to appraise your property.

You have the **right** to ensure that your property is appraised uniformly with similar property in your county.

You have the **right** to petition a local government to call an election to limit a tax increase in certain circumstances.

You have the **right** to receive exemptions or other tax relief for which you qualify and apply timely.

You have the **right** to notice of property value increases, exemption changes, and estimated tax amounts.

You have the **right** to appeal the appraisal review board's decision to district court in the county where the property is located.

You have the **right** to fair treatment by the appraisal district, the appraisal review board, and the tax assessor-collector.

You have the **right** to voice your opinions at open public meetings about proposed tax rates and to ask questions of the governing body responsible for setting tax rates.

You have the **right** to have your property appraised according to generally accepted appraisal methods and techniques and other requirements of law.

You have the **right** to protest your property's value and other appraisal matters to an appraisal review board composed of an impartial group of citizens in your community.

You have the **right** to receive a free copy of the pamphlet entitled Property Taxpayer Remedies published by the Texas Comptroller of Public Accounts prior to your protest before the appraisal review board.

Texas Property Tax Calendar

January 1	January 31	April 15	April 30	May 15 (or 30 days after Appraised Value Notice is mailed)	June–September	September– December	October 1–15	December
Appraisal district starts current year valuation process.	Last day to mail/pay your tax bill for the preceding year without penalty. Deadline to file late protests for the preceding year.	Deadline for filing personal property renditions.	Deadline to file exemption and special valuation applications.	Deadline for filing property tax protests.	Period that the majority of protest hearings are held. Chief Appraiser certifies appraisal roll.	SWBC Tax Advisors communicates the results of protest hearings and tax confirmations.	Tax offices mail tax bills for current year. Tax payment due prior to January 31 of the following year.	Payment due for any expense of any kind related to your properties in order to qualify as a current year IRS expense.



SWBC Ad Valorem Tax Advisors takes great pride in ensuring each of our clients not only accomplishes the best possible outcome, but also receives unmatched service throughout the entire process.

To learn more about how SWBC Ad Valorem Tax Advisors can help you save on your property taxes, call **210.376.2300** or visit swb.us/ad-valorem.