



# Property Taxes

**Each year US businesses pay over \$180 billion in state and local property taxes<sup>1</sup>.** Many of these businesses may overpay by twenty percent or more due to clerical errors in preparing and processing returns, asset misclassification, valuation issues, inaccurate asset lists, and the increasing complexity of tax laws and regulations, which all contribute to the problem.

Additionally, businesses have the expense of complying with filing deadlines while attempting to stay current with changing tax laws, regulations, and burgeoning paperwork requirements. It's hard enough for most tax departments to keep up with compliance requirements, let alone review and appeal asset valuations.

**Property Tax Assistance Company has been helping taxpayers across the country reduce their business property tax burdens since 1975.**

Our success for our clients has made us the largest property tax consulting firm on the West Coast with a growing national practice.

Our team of tax professionals holds multiple professional designations and comes from a wide range of disciplines such as accounting, appraisal, legal, manufacturing, technology development, and more. We have more than two hundred fifty combined years of experience in property taxation—experience backed by a support staff that is second to none in the industry.

Over the years, we have saved clients across the country hundreds of millions in excess property tax. A great deal of this money has been returned to taxpayers in the form of refunds.

We can do the same for you.

<sup>1</sup>Source: Council on State Taxation



## PTA Property Tax Assistance Company

For more than three decades Property Tax Assistance Company has found savings for clients from just about every market segment. Following is a partial list of markets that we serve.

### **Agribusiness**

### **Communications & Information Services**

*Broadband/Cable/Satellite  
Broadcasting / New Media  
Call Centers  
Data Centers  
Publishing*

### **Financial**

*Equipment Leasing  
Online Banking/Brokerages*

### **Healthcare**

### **Manufacturing**

*Aerospace  
Consumer Electronics  
Defense  
Food Products  
Medical Products  
Pharmaceuticals  
Plastics  
Semiconductors*

### **Professional Practices**

### **Real Estate**

*1031 Exchanges  
Golf Courses  
Banks & Office Buildings  
Industrial Space of all kinds  
Major Multi-family Properties  
Shopping Centers & Other Retail Space*

### **Research & Development**

### **Retail & Distribution**

*Automotive Sales  
Hospitality  
Retail Operations  
Warehouse & Distribution Centers*

# Property Taxes Made Easy!



## PTA Property Tax Assistance Company

PTA



# Property Taxes Made Easy!

## Personal Property Tax Services

At the heart of PTA's personal property tax services is the **PTA Personal Property Tax Review**. We will compare your personal property tax filings to your fixed asset listings to ensure that your assets are correctly classified and valued. We will also review your valuation notices and your tax bills. If we find errors, we'll advise you about correcting them. If no problems are found, you'll have confidence that you have reported correctly and that your tax bills are accurate. Either way, the review will cost you nothing.

### Appeals

If, after we complete our review, we determine that there is an opportunity for savings and/or refunds, we'll prepare appeals, represent you at county and state levels, and/or negotiate settlements - all on a contingency basis. We assume the risk. If we don't save you anything, you pay nothing. Or if you prefer, we will work on a retainer or hourly fee basis.

### Audit Defense

Each year the personal property tax returns of selected taxpayers across the country are audited. In some states audits are mandatory. Far too often errors are made in the audit process that result in hundreds of thousands of dollars in excess taxes, penalties, and interest. PTA can help correct these errors and "audit the auditors."

### Compliance

After the Personal Property Tax Review is complete, PTA's Compliance Division can ensure that your personal property assets are correctly reported and that your returns are timely filed. Each return will be fully documented in order to prepare for an audit on the part of the taxing authorities.

## Real Estate Property Tax Services

PTA's **Real Estate Tax Division** specializes in reducing assessed values for Commercial, Industrial, and Multifamily properties and has been very successful with issues like Valuation Decline Appeals, 1031 Exchanges, Multi-Property Transactions, Possessory Interest, major New Construction (cost segregation and valuation), Base Year Transfer valuations, and Ownership Change determinations. We handle every aspect of the Property Tax Process from Due Diligence analysis, Tax Bill Review, Property Value Analysis, Assessor Contact & Negotiation, Appeal Hearing Presentation, and the release of Refunds.

### Top Real Estate Professionals with State of the Art Valuation Systems

Our staff includes former County Assessor personnel, licensed attorneys, appraisers, real estate brokers/agents, CMIs, and CPAs supported by a team of extremely knowledgeable technical consultants armed with leading edge information technologies to obtain the most current data from a range of on-line sources. With this data in hand and through the use of highly sophisticated software tools, PTA's tax professionals are able to ensure that your tax liability is kept to an absolute minimum.

### Direct Assessment Analysis

Many taxpayers do not realize that real estate property taxes include more than the property owner's general tax levy, PTA's **State Tax Management Group** can ensure that your special assessments are fair and accurate. We are committed to investing in the time and effort necessary to identify unfair and incorrect assessments and to get them remedied.



## More than counting a few beans

**Property Tax Assistance Company** has helped businesses reduce their property tax bills for more than three decades.

We've been successful because we take the time to learn your business and how it works. Then we ask questions to make sure your books and records accurately reflect what you really have.

We also make sure that we completely understand your local taxing authority's asset valuation methodologies and depreciation procedures - along with the applicable tax statutes, administrative codes, and relevant case law. It's only then that we begin our review of your tax bills.

It can be an involved process, but it's worth the effort. We have the experience and the tools to perform these types of reviews. If there are savings to be found, we will find them.

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