

Application for Tax Abatement

– Harris County, Texas –

Prior to any public expression of a decision or any commitment (legal or financial) to the proposed project by applicant, a completed original of this application, including supporting documentation of competitive siting, narrative impact statement, **and a \$1000.00 application fee (non-refundable)** must be submitted to Harris County Department of Economic Equity & Opportunity, 1001 Preston, Ste. 670, Houston, TX 77002. This application will become part of the Tax Abatement Agreement and any knowingly false representations will be grounds for terminating the application and/or voiding the agreement. The County will forward copies to other taxing jurisdictions, as may be required by Texas statute.

PART I - APPLICANT INFORMATION

Application Date: _____

Company Name: _____

Headquarters Address: _____ City: _____ State: _____ Zip: _____

Local Address: _____ Zip: _____ Annual Sales (\$): _____

Local Phone Number: _____ State of Incorporation: _____ Years in Harris County _____

Email: Website: _____ Local Fax Number: _____

Total Employees Worldwide: _____ Texas: _____ Harris County at Present: _____

Attach description of Applicant Company, including brief history, corporate structure, financial statement, & annual report, if incorporated in what state corporation is designated with copy of legal documents showing incorporation information, and Secretary of State Certificate authorizing company to conduct business in the State of Texas.

PART II - PROJECT INFORMATION

Location Address: _____ City: _____ Zip: _____ Key Map # _____

Legal Description*: _____ County: _____

School District(s): _____ College District: _____

All Tax Acct. Numbers: _____ NAICS #: _____

Project Description: New Construction Expansion City (as identified on the Tax Account) _____

** Attach plat survey, with a metes & bounds description, for project site.*

Attach statement fully explaining project, describe existing site and all proposed improvements, and provide complete detailed (line item) "Investment Budget" detailing improvements for which abatement is requested.

Section A - Economic Development

Type of Facility:	Convergence Technology	Green Industries	
	Manufacturing	Research & Development	Other Basic Industries
	Regional Distribution	Regional Entertainment	Regional Service Center

Describe product or service to be provided and to what purpose: _____

For regional facilities, provide market studies, business plans, or other materials demonstrating that the facility is intended to serve a primary market which lies at least 100 miles outside of Harris County.

Section B - Variance

Is the applicant seeking a variance to Guidelines? Yes No

If "yes" attach letter requesting and justifying the variance, with supplemental information.

PART III - ECONOMIC INFORMATION

Construction Estimate:

Start Date _____ Contract Amount \$ _____

Completion Date _____ Peak Construction Jobs ____ Construction Man-Years _____

If Modernization:

Estimated current economic life of structure _____ years _____

Added economic life from modernization _____ years _____

Permanent Job Creation/Retention in Harris County:

- Current employment: _____ Note: For existing Harris County facilities include current employment per each facility in Harris County along with copy of the Texas Workforce Commission “Employer’s Annual Report” for the last four quarters.
- Number of Jobs to be Retained: _____
- Number of Jobs to be created on or before January 1, 20____ after 3 years from the effective date of the Tax Abatement Agreement: _____

Estimated Appraised Value On Site	Land	Improvements	Total
Value on January 1 preceding abatement (Per Harris Central Appraisal District Records and Account Number)	\$	\$	\$
Estimated value of new abatable investment: Building		\$	\$
Estimated value of new abatable fixed-in-place Machinery and Equipment		\$	\$
Estimated value not subject to abatement (e.g., Inventory)		\$	\$
Estimated value of property subject to ad valorem tax at end of abatement		\$	\$

Company Representative Authorized For Contact:

Authorized Company Official:

Name:	Authorized Signature:
Title:	Name:
Telephone #:	Title:
Email:	Telephone #:
Website:	Email:
	Website:

***Narrative
(to Accompany Application)***

I. Company Information

- a. Describe the Company's business activities, locations, primary markets, history (when and where incorporated), headquarters location, parent or subsidiary companies in the form of limited partnerships or limited liability companies with a complete diagram showing names, ownership percentages, and which ones will be active and in what capacity concerning this project.
- b. Names of chief officers and information showing legal authorization of those persons qualified to sign on behalf of the company.
- c. Provide copy of annual report or financial statements, as detailed in "Instructions."
- d. Provide documentation evidencing company's registration with and authorization to conduct business in the State of Texas.

II. Site Control

- a. If company owns the proposed property for abatement, include documents evidencing ownership such as recorded deed or title to property, title insurance policy.
- b. If company is leasing property, attach copy of lease. Please note that the lease contract shall include a provision allowing the applicant to terminate lease agreement without penalty, in the event a tax abatement is not granted by Harris County.
- c. If company is purchasing property, attach copy of deed or executed contract-option to purchase. Please note that the option-contract to purchase shall include a provision whereby the applicant may terminate contract-option to purchase without penalty, in the event a tax abatement is not granted by Harris County.

III. Project Description

- a. Facts about the proposed site (acreage, cost, location, ownership, survey).
- b. Type and value of proposed improvements (construction budget in line-item form, list of fixed in place equipment to be included in the project).
- c. Project timeline – construction start date and end date.
- d. Environmental impact information must be provided, noting any anticipated impacts of the project on the environment, including, but not limited to, water quality, storm water and runoff, floodplain and wetlands, solid waste disposal, noise levels and air quality. Further, include history of environmental compliance by company as required in Guidelines and Criteria.
- e. All other governmental assistance/incentives being requested or already approved for the project, (e.g. Industrial Development Bonds, Smart Jobs Funds).

IV. Jobs

- a. Provide information on current level of employment per each facility located in Harris County, including: (1) physical address of each facility, (2) current payroll, and (3) breakdown of current employment by zip code. Attach a copy of the Texas Workforce Commission "Employer's Quarterly Report" for the last four quarters and other supporting documentation evidencing actual employment level at time of application submission.
- b. Provide information on the projected full-time job creation associated with the project, including: (1) new employee needs; e.g. skilled vs. non-skilled, level of education, experience, etc.; (2) proposed pay scale; (3) any training which the company will provide to its new employees; (4) upward mobility opportunities, career tracks, etc. available to less educated and experienced workers; and (5) if this is a consolidation of existing Harris County facilities, information on number of "new hires" vs. "transfers."
- c. Provide information on construction jobs to be created by project.

V. Tax Abatement and Comparative Site Selection Analysis

Provide reasons for seeking abatement. Include any special considerations. **State how project will benefit the community where it will be located.** If requesting any variances, please provide the justification for the request.

Additionally, provide detailed information on alternative site considerations and incentives being offered the company. State who the company has visited with outside of Harris County concerning tax abatement in another county, state, or country and provide copies of any letters of intent from the ones offering incentive.

Further, provide a comprehensive and comparative site selection analysis substantiating request for tax abatement in Harris County. The report shall include analysis of key site selection criteria deemed essential for the company's operation, recruitment, retention of talent, and intended market to deliver goods and/or services. The analysis, at a minimum shall include information on how the tax abatement, if granted, would benefit the company, what would be the estimated net cost savings achieved per each location considered, information on location characteristics (e.g. transportation needs, utility needs, infrastructure needs, input resources, etc.) deemed essential and/or beneficial to the company's operation and retention of talent, and description of the intended market. Following is a sample outline the applicant may consider when developing the site selection comparative analysis report:

1. *Business and Operating Conditions*: describe accessibility to customers, suppliers, and connectivity and transportation requirements; describe workforce requirements; describe utility and infrastructure requirements; and describe regulatory/permitting environment.
2. *Geographically Variable Costs*: describe per each site workforce wages, salaries, and benefits; taxes (income, ad valorem, customs/duties, fees); real estate (land/sites); improvements; lease; utilities; logistics; and incentives to include description of variable cost offsets; inflation.
3. *Real Estate/Site*: current site conditions, needed improvements, availability of site, does the site fit the needs of the project, expandability, infrastructure, terms and conditions of lease contract, or option-contract to purchase, schedule.
4. *Risks*: describe potential natural disaster risks, political risks, social/safety risks, local economic status and currency, schedule.

VI. Local Business Competition

- a. List any competition or similar businesses in the area.
- b. Describe how an abatement will impact competition with other similar businesses in the area.

VII. Market Creation: Please provide information on how this project would attract new business?

**APPLICATION WILL NOT BE CONSIDERED COMPLETE UNTIL
ALL REQUIRED INFORMATION HAS BEEN SUBMITTED**