

SETTLEMENT OFFER FORM
TAX YEAR _____

Premise: _____ Square: _____ Lot: _____ Year Built: _____

Zoning: _____ Type: _____ Class: _____ FAR: _____ / _____ Govt Limitation: _____
Developed/Allowable

NRA: Total _____ Office: _____ Retail: _____ Below Level: _____

Land Area/GBA/No. Hotel Rooms: _____ Capital Expenditures: \$ _____

Last Sale Date: _____ Price: _____ Price/sq.ft.: _____ Hotel Rooms: _____

Last Economic Transfer Date: _____ Price: _____ Price/sq. Ft.: _____ %

Renovation Year: _____ Amount: _____ Mortgage Balance on 1/1/15: _____

Recent Appraisal(s): Date _____ Value _____ \$/FAR: _____ Appraiser _____

Expenses: CY14 _____ CY15 _____ CY16 _____

Vacancy: CY14 _____ CY15 _____ CY16 _____

NOI: CY14 _____ CY15 _____ CY16 _____

Assessor: _____ Other: _____

I.	<u>Assessment</u>	<u>RPTAC Action</u>	<u>Settlement Offer</u>
Land	\$ _____	\$ _____	\$ _____
Improv.	\$ _____	\$ _____	\$ _____
Total	\$ _____	\$ _____	\$ _____

II. Preceding/Other Assessments*

	_____ - Court Assessment	_____ - Court Assessment	_____ - Court Assessment
Land	\$ _____	\$ _____	\$ _____
Improv.	\$ _____	\$ _____	\$ _____
Total	\$ _____	\$ _____	\$ _____

III. Narrative Supporting Settlement

(Over)

Note: Provide Supporting Documentation Including Proof of Tax Payment.

Signature _____ Print Name _____
Address _____ Telephone: _____

Date: _____

- | | |
|---|--|
| 1. Indicate Developed/Allowable Floor Area Ratio | 4. Net Rentable Area |
| 2. <u>E.g.</u> Historic | 5. Gross Building Area |
| 3. Indicate Actual and Stabilized Per Square Foot Expenses, Vacancy and Credit Loss Allowance | 6. Per Point FAR (Land) |
| | 7. Calendar Year Net Operating Income. |

* Provide Court Docket Number, if any.

DISCLOSURE AUTHORIZATION

Court Docket Number: _____

Date: _____

Petitioner: _____

SCOPE OF DISCLOSURE: Petitioner in the above-referenced lawsuit, commenced in the Superior Court of the District of Columbia, Tax Division, hereby authorizes, as its agent,

AUTHORIZED AGENT

(Type/Print Name of Authorized Agent)

Title/Firm Name

Street Address, City, State

to divulge, discuss, receive, access and inspect tax, proprietary, and financial information of the Petitioner, including but not limited to documents, agreements, consents, memoranda of understanding, valuation records, letters of intent, lawsuits, reports, mortgage, security interest, and other instruments with respect to the income, expense, lease, rental, collateralization, economic benefit, and tax liability related to the property that is the subject of the above-referenced lawsuit.

RIGHT TO REVOKE: This authorization shall remain in effect unless revoked. Petitioner may revoke this authorization at any time, by submitting to the Office of the Attorney General, Commercial Division, Tax and Finance Section, written notice of revocation, stating intent to revoke this authorization.

PETITIONER

Signature of Petitioner

Type/Print Name

Title

Firm/Company Name

Street Address, City, State

Email address

Petitioner Settlement Offer Submission Requirements:

Petitioner Settlement Offers are processed electronically by emailing Petitioner Settlement Offer Submissions to the Office of the Attorney General Intake Administrator (for this purpose) in the following manner:

To: Sandra.Proctor@dc.gov

Sub: [Four Digits of Docket Number Excluding Preface Zeroes] - 20] Tax Year] Petitioner Settlement Offer

Attachment: PDF of Petitioner Settlement Offer

- Adherence to Petitioner Settlement Offer Submission Format (including the email subject line description and sequence of information) facilitates settlement offers processing.
- Petitioner Settlement Offers must conform to the format that accompanies the Tax Court's Mediation Order/Mediation Praecipe.
- Petitioner Settlement Offers must be signed and dated by the Petitioner or Petitioner's Counsel of Record.
- Petitioner Settlement Offers and accompanying exhibits and attachments must be submitted in PDF format. Please see attached chart for requested information that may facilitate a quicker resolution.
- **Only** Petitioner Settlement Offer Submissions that are submitted as set forth above will be processed. Accordingly, *do not* email or otherwise copy Petitioner Settlement Offer Submissions to individual Assistant Attorney Generals, Assessors, or other persons in the Office of the Attorney General, the Office of Tax and Revenue, or other District of Columbia agency.
- Petitioner-Taxpayer Representative Disclosure Authorization. Each Petitioner must complete and submit to the Office of the Attorney General for the District of Columbia, Commercial Division, Tax and Finance Section, **prior to** any mediation or other discussion between the District of Columbia and any person other than the Petitioner, pertaining to the income, expense, lease, rental, collateralization, economic benefit, or tax liability of the property. Please email the Disclosure Authorization to Sandra Proctor at Sandra.Proctor@dc.gov.

Your cooperation shall be appreciated.

Rena Stong
Section Chief, Tax and Finance Section
Office of the Attorney General for the District of Columbia
(202) 442-9835