



# HISTORIC SITE TAX EXEMPTION APPLICATION

## HISTORIC AND CULTURAL LANDMARKS COMMISSION

CITY OF FORT WORTH, TX 76102 200 TEXAS STREET (817) 392-8574 / Fax: (817) 392-8016

<b>2017 HCLC Meeting Dates..... Application Deadline</b>	<b>2017 HCLC Meeting Dates ..... Application Deadline</b>
January 9..... December 19	July 10 ..... June 19
February 13..... January 17	August 14 ..... July 17
March 13 ..... February 20	September 11 ..... August 21
April 10 ..... March 20	October 9..... September 18
May 8..... April 17	November 13..... October 16
June 12..... May 15	December 11..... November 20

### How do I obtain the Historic Site Tax Exemption?

The Historic Site Tax Exemption (HSTE) involves a two-part process that requires approval by the HCLC and the City Council before the project is started, and final verification by the HCLC and the City Council upon completion of the project. The Tax Exemption will go into effect January 1<sup>st</sup> of the year following City Council verification. The Tax Exemption freezes the taxable ceiling of the land and improvements at the pre-renovation values for the purpose of assessing City of Fort Worth taxes. The exemption period is ten (10) years. Application to the Tarrant Appraisal District must be made by the property owner each year of the exemption.

Eligibility for the Tax Exemption requires that an investment equal to or greater than 30% of the assessed valuation of the improvements be spent on rehabilitation. The HCLC must approve all work requiring a Certificate of Appropriateness in advance. Work, which does not require a Certificate of Appropriateness, may be counted toward the investment up to five years after the expenditure with appropriate receipts. Please contact the Historic Preservation Officer for more information.

### **Step 1: Partial Approval**

Upon submission of the completed application, the item will be placed as a public hearing action item on the next scheduled HCLC meeting. Incomplete applications will not be accepted or forwarded to the HCLC for action. Please see the HSTE page of the application for required documentation. Upon approval by the HCLC, your application will be forwarded to the City Council for action.

### **Step 2: Verification**

Upon completion of the stabilization or rehabilitation project, the applicant shall return the documents listed on the HSTE page of the application to the HCLC for verification. If the verification of completion is favorable, the HCLC shall forward your application to the City Council for verification approval. Once verified, City staff notifies the Tarrant Appraisal District of the tax exemption to begin on January 1 of the following year.

If the verification of completion is unfavorable, you shall be required to complete the project in order to secure the HSTE; your application will be returned for consideration of approval after all work has been completed.

**NOTE: Upon verification of the HSTE, a signed and notarized copy of the City of Fort Worth form "Notice of Historic Site Tax Exemption" shall be filed in the office of the Tarrant County Clerk before the City shall grant the HSTE.**

## **ACKNOWLEDGEMENTS**

I certify that the above information is correct and complete to the best of my knowledge and ability and that I am now or will be fully prepared to present the above application to the Historic and Cultural Landmarks Commission public hearing. I understand that if I am not present or represented at the public hearing, the Landmarks Commission may continue or disapprove/deny the application. I authorize members of the Landmarks Commission and officers of the city to visit and inspect the property.

I understand that there are two steps to receiving the Historic Site Tax Exemption. The first step is submitting the Historic Site Tax Exemption and Certificate of Appropriateness applications to the Landmarks Commission prior to starting rehabilitation. I understand that required permits and inspections must be obtained from the Development Department. The second step in receiving the tax exemption occurs upon completion of the project. I am responsible for submitting the required documentation to the Planning Department for verification of the project's completion by the Landmarks Commission and the City Council.

I agree to provide any additional information necessary for determining eligibility as requested by the Planning Department, the Landmarks Commission or City Council.

\_\_\_\_\_  
Owner/Agent Signature

\_\_\_\_\_  
Date



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(817) 392-8574 / Fax: (817) 392-8016

## HISTORIC PROPERTY

Street & Number: \_\_\_\_\_

Zoning: \_\_\_ HSE (Highly Significant Endangered) \_\_\_ HC (Historic & Cultural Landmark)

## PROPERTY OWNER / AGENT

Owner's Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Mailing Address: \_\_\_\_\_ Email: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Agent (if any): \_\_\_\_\_ Phone Number: \_\_\_\_\_

Street & Number: \_\_\_\_\_ Email: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

## PROJECT INFORMATION

Required 30% Expenditure \$ \_\_\_\_\_ Estimated Expenditures \$ \_\_\_\_\_

Projected Completion Date \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

## REQUIRED DOCUMENTS WITH HSTE APPLICATION

- Project description
- Statement of costs equal to or exceeding 30% of the improvements value
- Photographs of current conditions
- Signed application

## REQUIRED DOCUMENTS UPON COMPLETION OF HSTE WORK

- Copies of all receipts for eligible project costs
- Proof of final inspection by the Development Department
- Proof that a Certificate of Occupancy has been issued (if applicable)
- Photographs of finished project
- Signed application

## DESCRIPTION OF WORK

Please describe in detail the work you intend to complete. If necessary, continue on an additional sheet. \_\_\_\_\_

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