



THE CITY OF ROCKDALE AND THE COUNTY OF MILAM JOINT APPLICATION FOR TAX ABATEMENT ASSISTANCE



This application is relative to the City of Rockdale and the County of Milam ad valorem taxes. The application will become a part of any Tax Abatement Agreement with the County of Milam and/or the City of Rockdale. Knowingly providing false information will result in voiding the application and termination of any Tax Abatement Agreement.

Date of application (MM/DD/YY): / /

SECTION I – APPLICANT INFORMATION AND BUSINESS DESCRIPTION

Company name:

Address:

City: State: Zip: -

Principal contact name:

Title:

Mailing Address:

City: State: Zip: -

Telephone: () - Fax: () -

E-mail address:

- 1.1 Indicate ownership of applicant company: ☐ Private ☐ Public
- 1.2 Indicate applicant's North American Industrial Classification System (NAICS) code for the operations at the project location:
- 1.3 Indicate applicant's type of business entity, i.e., proprietorship, partnership, joint venture, or corporation:
- 1.4 Identify applicant's state of registration or incorporation, if applicable:
- 1.5 Identify business headquarters location (city, state): ,
- 1.6 Does/will the applicant own or lease the project land and/or facility: ☐ Own ☐ Lease
If leased, indicate lease term: Years Expiration date: / /
- 1.7 Indicate applicant's total workforce: Full-time: Part-time: Seasonal:
- 1.8 Indicate applicant's local workforce: Full-time: Part-time: Seasonal:

1.9 Indicate applicant's existing Milam Appraisal District tax account numbers:

Real property: - -

Personal property: - -

Inventory and supplies: - -

1.10 Identify the owner or owners of the real and/or personal property if applicant is not the owner:

1.11 Is the company delinquent in the payment of ad valorem taxes to any taxing unit located in Milam County: ☐ Yes ☐ No If yes, explain:

SECTION II – PROJECT DESCRIPTION

2.1 Type of facility (check):

☐ Agribusiness

☐ Aviation/Aerospace

☐ Biotechnology

☐ Creative Services

☐ Environmental Technology (also known as Clean Technology or Green Technology)

☐ Finance

☐ Information Technology and Security

☐ Logistics and Distribution

☐ Manufacturing (any industry)

☐ Telecommunications

☐ Corporate and Regional Headquarters

☐ Retail

☐ Tourism

☐ Urban Significant Projects, including but not limited to mixed-use and multi-family rental only housing projects (the terms of these Urban Significant Projects will be negotiated separately)

2.2 Type of project (check): ☐ New construction ☐ Expansion or modernization

☐ lessor only improvements

2.3 Fully describe the proposed project, including capital improvements (real and personal property) to be undertaken, the facility's use, and the product or service to be produced:

2.4 Briefly justify why this tax abatement is necessary for the project to be located in Milam County/Rockdale and describe the project's associated community benefits:

2.5 Indicate any other incentives sought in connection with the proposed project:

2.6 List other communities that are being considered for the proposed project (if possible):

2.7 Indicate project street (or county) address:

2.8 Is the project located in an empowerment or existing enterprise zone: ☐ Yes ☐ No

2.9 Identify the jurisdictions where the proposed project will be located:

County Commissioner precinct number: City Council district: School district:

SECTION III – PROJECT VALUATIONS

3.1 As provided by the Milam Appraisal District, indicate the appraised values of the following:

Land (excluding acquisition costs) Value: \$ Date / /

Existing real property Value: \$ Date / /

Existing personal property Value: \$ Date / /

3.2 Are any of the appraised values described above currently being contested:

☐ Yes ☐ No If yes, please explain:

3.3 Indicate the estimated project improvement values:

Real property: \$ Personal property: \$ Inventory/supplies: \$

SECTION IV – PROJECT JOB CREATION

4.1 Number of new, permanent jobs to be created: Full-time: Part-time:

4.2 Indicate the number of new, full-time jobs to be created for each year of the project:

Year 1 (20)		Year 6 (20)	
Year 2 (20)		Year 7 (20)	
Year 3 (20)		Year 8 (20)	
Year 4 (20)		Year 9 (20)	
Year 5 (20)		Year 10 (20)	

4.3 Indicate the project impact on the following job position classifications (at full operations)¹:

	Managerial/ Executive	Professional	Clerical	Other (Identify)
Total number of employees	F/T:	F/T:	F/T:	F/T:
	P/T:	P/T:	P/T:	P/T:
# to be filled by a relocated worker				
Salary range	\$ - \$	\$ - \$	\$ - \$	\$ - \$
Min. hourly rate	\$	\$	\$	\$

- 4.4 Indicate the projected Average Annual Salary with Existing Jobs and the projected Average Annual Salary with the additional New Jobs.

Existing Jobs:

New Jobs:

- 4.5 Will medical benefits be provided?:

SECTION V – PROJECT CONSTRUCTION

- 5.1 Schedule for undertaking and completing the proposed improvements (MM/YY):

Start date: / Completion date: /

SECTION VI – OTHER PROJECT INFORMATION

- 6.1 Has the company or any of its affiliates been cited, currently under investigation, or have litigation pending for any violations of Federal, State, County and/or City laws, codes or ordinances:
☐ Yes ☐ No. If yes, indicate the nature/status of the violation(s):

- 6.2 Has the company received a tax abatement before: ☐ Yes ☐ No

If yes, indicate the granting governmental entities:

If yes, indicate the time period (MM/YY): / to /

If yes, is/was the company in compliance with all terms and conditions: ☐ Yes ☐ No

- 6.3 Is any legal or financial interest in the proposed project presently held by a member of the Rockdale City Council or other City official or employee: ☐ Yes ☐ No
If yes, name of individual(s)

- 6.4 Is any legal or financial interest in the proposed project presently held by a member of Milam County Commissioners Court or other County official or employee: ☐ Yes ☐ No
If yes, name of individual(s)

APPLICATION ATTACHMENTS

The following information supports various application sections and is needed to fully evaluate the company for tax abatement assistance. *Applications will not be considered until all the information is received:*

SECTION I – APPLICANT INFORMATION AND BUSINESS DESCRIPTION

1. Provide information regarding the applicant company's description, including corporate structure, annual financial statement if currently in business or proposed financial statement if this is a startup or prior year report, and organization chart identifying affiliates and subsidiaries, if any.

SECTION II – PROJECT DESCRIPTION

2. Indicate property legal description and a plat showing the location of existing and proposed improvements.

SECTION III – OTHER PROJECT INFORMATION

3. Provide an assessment of the proposed project's environmental impact, and any remediation and/or compliance plan associated with the project, which would have the effect of minimizing the negative impact of the project on the environment.
4. Describe any goodwill benefits and involvement that the applicant company has previously provided and/or is committed to providing in the future to the County of Milam community and the Rockdale community.

CERTIFICATION

I certify that I am authorized to sign the tax abatement application and that the information provided in this application is true and correct. I understand that the information provided will become a part of the Tax Abatement Agreement with the County of Milam and the City of Rockdale. I also understand and certify that I have read the Milam County Tax Abatement Guidelines and City of Rockdale Tax Abatement Guidelines and Procedures and am familiar with the provisions contained therein. Moreover, I recognize and agree to forego any protest, applications, or other procedures available to taxpayers that would challenge or dispute the assessed value annually determined by the Milam County Appraisal District, if awarded a Tax Abatement.

Signature: _____ Date (MM/DD/YY): / /

Printed Name:

Title:

Company Name:

Submit one copy of this application and all attachments to: City Manager, City of Rockdale, PO Box 586, Rockdale, Texas 76567. Submit another copy of this application and all attachments to: County Judge, Milam County Commissioners Court, 102 S. Fannin Avenue, Cameron, Texas 76520.