

SAMPLE fee agreement (sample data, not an offer)

Version 2027.1-draft

SAMPLE with made-up data. DRAFT wording pending legal review. Not for signature as final wording.

Parties

This agreement is between Assessment Appeal LLC (Assessment Appeal) and the owner group Sample Owner Group, for each of these owning entities: Sample Property LLC.

Each appealed assessment year is named separately

We will appeal only the parcel-years listed here. Each one is a separate appeal, with its own fee and its own invoice issued after its own official determination.

- Parcel 00-00-00-000-000.000-000 (100 Sample Street, Sampletown), owned by Sample Property LLC: the January 1, 2027 assessment (taxes payable in 2028). Fee: 25% of the first pay-year tax savings for this assessment year (standard rate).

Fee

Our standard fee is 25% of the first year's tax savings for each appealed assessment year.

If your group has 6 or more appeals filed in the season (each appealed parcel-year counts as one), every appeal that season is charged 20%. This is settled when invoices are prepared. Where more than one rate applies, the lowest is used.

If an appealed year is escalated to an attorney (Indiana Board of Tax Review or Tax Court), our fee for that year drops to 15%.

No reduction, no fee

There is no fee for any appealed year without a reduction in assessed value. There is no minimum fee, no subscription, and no fee for later years unless you authorize a new appeal for that year.

How savings are calculated

Savings for an appealed year = (the assessed value on the Form 11 notice minus the final assessed value) times the effective tax rate for that year's pay year, from the actual tax bill.

The certified representative confirms the figures. Every figure before the official determination is an estimate.

Invoices

We prepare one invoice per official determination (the PTABOA final determination or an approved Form 134 agreement), with the determination and the savings calculation attached. No invoice is sent without the official document.

Contingent fee disclosure

This is a contingent fee. Under 50 IAC 15-5-7, the representative must disclose it to the county board (PTABOA), the Indiana Board of Tax Review, or the Department of Local Government Finance on request.

Your representative and successors

Certified tax representative: [certified representative], DLGF certification [DLGF certification number], certified through 2026-10-20.

Successor representatives named on each power of attorney (State Form 23261): none named. If the named representative cannot continue, a successor handles your appeals under the same terms.

Not a law firm

[certified representative] is a certified property tax representative, not an attorney. [certified representative] may not present arguments of a legal nature on your behalf and may not address legal issues relating to your assessment. A legal issue not raised at the right stage of an appeal may not be raised later. If you have a legal question about your assessment, talk to an attorney; we can give you a list.

Authorization every season

Nothing is filed without your approval (or your named delegate's) for that parcel and that year. No response means no filing.

Renewal

Renewal for a later season is off unless you tick the renewal box. You can change it at any time.

Your financial documents

P&L, rent roll, and income summaries are shared only with the representative, and with the assessor and board only for evidence sections you approve. They are deleted 12 months after the case closes.

Income information duty

For income-producing property, you agree to give us an income summary within 10 days of an assessor's request. If it is not provided in time, we may withdraw the appeal.

Purchase offers

We will not request or submit purchase offers you have received unless you ask us to.

Withdrawal and cancellation

You can withdraw an appeal before the preliminary informal meeting with the assessor. You can cancel at any time from the link in any of our emails; cancellation takes effect immediately for every parcel not yet filed. Withdrawing or cancelling does not create a fee.

Estimates, not promises

Every amount before the official determination is an estimate. An appeal can also end with a higher assessed value. Nothing in this agreement promises a result.