



## PROPERTY TAX EXPERTS, INC.

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AUGUST 2025

RE: NEEDED DOCUMENTS

Dear Property Owner:

Thank you very much for the opportunity to assist you in lowering your 2025 Ad-Valorem assessment and commensurate real estate taxes.

Value Adjustment Board hearings start from approximately the last week in September 2025, through May of the following year 2026. Your hearing date may be scheduled in late September 2025 or later in the following year 2026. Supplying the necessary data ahead of time will ensure enough time to prepare for your hearing.

To perform the quality work that you require of us, I must ask you for documents that may be key to analyzing your property. **Some of these documents listed below do not apply to your type of property. However, try to send us as many of these items as possible.**

THE FOLLOWING DOCUMENTS OR ITEMS LISTED BELOW WILL GIVE ME VERY VALUABLE INFORMATION ABOUT YOUR PROPERTY. REMEMBER, IT IS THE ECONOMIC AND OR MARKET CONDITIONS OF THE PROPERTY FOR THE FULL YEAR OF 2024 UP THROUGH THE ASSESSMENT DATE OF JANUARY 1, 2025.

1. 2024 FEDERAL INCOME TAX RETURNS RELATED TO PROPERTY ONLY. FEDERAL TAX RETURNS (with accompanying schedules or attachments), such as if applicable: - I.R.S. FORM 8825 - RENTAL REAL ESTATE INCOME AND EXPENSES OF A PARTNERSHIP OR AN S CORPORATION; OR A SCHEDULE E (Form 1040) SUPPLEMENTAL INCOME AND LOSS; 1120 FORM - U.S. CORPORATION INCOME TAX RETURN; FLORIDA TANGIBLE PERSONAL PROPERTY TAX RETURN.
2. 2025 CERTIFIED FINANCIAL STATEMENTS (only applicable to your property), OPERATING STATEMENTS REFLECTING SPECIFIC INCOME AND EXPENSES, ACCOUNTING NOTES OR SCHEDULES.
3. CURRENT REALTOR LISTING FACT SHEET OR OFFERS AND OR EXECUTED PURCHASE AND SALE AGREEMENT.
4. COPY OF A CLOSING STATEMENT PERTINENT TO THE SALE.
5. MORTGAGE FINANCIAL DOCUMENTS AND ACCOMPANYING CLOSING STATEMENTS.

Property Tax Reductions for:

Land • Commercial/Industrial • Personal Property • Contamination Problems • Apartment Buildings • Hotels/Motels  
AFFILIATION: National Society of Environmental Consultants • The Commercial Industrial Association Of So. Florida  
International Association of Assessing Officers • Florida Association of Property Tax Professionals

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6. IF THIS PROPERTY HAS BEEN ACQUIRED IN THE LAST TWO YEARS; AN APPRAISAL OR OPINION OF VALUE LETTER, IN CONNECTION WITH OBTAINING MORTGAGE FINANCING WILL SUFFICE.

7. FEASIBILITY OR MARKET ANALYSIS.

8. COPY OF ANY LEASES IN THE FULL YEAR OF 2024, RENT ROLLS, LEASE DETAILS, INCOME AND EXPENSE PROJECTIONS FOR THE INVESTMENT HOLDING PERIOD. THE RENT ROLL MUST SHOW ALL RENTABLE SPACE OR UNITS AND RENT PER SQ.FT. OF EACH PLUS CAM, IF ANY. IF SPACE IS VACANT INDICATE MARKET RENT FOR THOSE UNITS OR SPACE

9. 2025 PROFIT AND LOSS STATEMENTS.

10.
  - a. Easements or reservations
  - b. Deed restrictions
  - c. covenant restrictions or variances
  - d. Zoning restrictions or variances
  - e. Encumbrances
  - f. Any declarations (e.g., Declaration of Condominiums)
  - g. General Contractor and Architectural contracts
  - h. Special Assessments or Lis-Pendens liens
  - i. Ownership type or interest in property
  - j. Map references/Property sketch/copy of Survey
  - k. Photographs and or aerial photographs
  - l. Physical attributes to property
  - m. Construction Cost data
  - n. Special Financing Arrangements
  - o. Environmental Audits - Phases I-III as applicable
  - p. Other governmental Restrictions that limit property use (e.g., zoning, or environmental remediation).

11. Pictures of excessive physical, external, or environmental deterioration that adversely affects the value of your property.

**I need whatever items listed above are applicable to your property.**

Thank you for your attention. If you have any questions, please call or e-mail me

Yours Truly,



Steven N. Housman, President

