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Property Tax in Indiana

Evansville, IN • August 27, 2013

Faculty

Moderator:

Cheryl Musgrave

Musgrave Consulting, LLC

C. David Matthews, MAI, CRE, SRA

David Matthews Associates

Judge Les C. Shively

Vanderburgh Superior Court

For more information about our speakers, go to www.lorman.com/ID391379.

Discover essential strategies for managing real and personal property tax.

Understanding how Indiana's unique property tax system works is crucial to developing a strategy to reduce the tax burden. Our panel of local professionals will provide practical answers to your most pressing questions about property tax assessments, appeals and exemptions. Get the information you need to analyze your property tax situations, and hear proven techniques for getting results. Don't wait – register today.

Benefits for You

- Determine what property is taxed
- Learn the critical components of valuation methods
- Successfully navigate the assessment appeal
- Revamp how you approach property tax issues for real property and personal property

Continuing Education Credit

- IN Assessor 7.5
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Learning Objectives

- You will be able to describe the role and perspective of the assessor.
- You will be able to discuss valuation and assessment of property.
- You will be able to explain the property tax appeal procedures.
- You will be able to review the impact of the 2011 reassessment.

For more detailed CE credit information, visit us at www.lorman.com/ID391379 or contact us at 866-352-9540.



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Seminar Agenda

8:00 AM – 8:30 AM	Registration	12:15 PM – 1:15 PM	Lunch (On Your Own)
8:30 AM – 9:30 AM	Real Estate Valuation Concepts for Ad Valorem Assessment — C. David Matthews, MAI, CRE, SRA <ul style="list-style-type: none">• Definitions• Valuation Methods or Approaches• Special Issues in Assessment Valuations	1:15 PM – 2:00 PM	Property Tax Assessment of Personal Property — Cheryl Musgrave <ul style="list-style-type: none">• Assessment of Personal Property and Fixtures• Assessment Calendar• Tax Abatement: Process, Annual Filings
9:30 AM – 10:30 AM	Role and Perspective of Assessor — Cheryl Musgrave <ul style="list-style-type: none">• Mass Appraisal vs. Single Property Appraisal• State Role vs. Local Role• Assessor Qualifications, Training and Staffing• Assessment Calendar<ul style="list-style-type: none">– Rolls, Preparation and Correction– Escape Assessment– Supplemental Assessment– Penalty Assessments– Notice to Taxpayers– Payment and Collection of Tax	2:00 PM – 2:50 PM	Challenging the Assessment (Real Property) — Judge Les C. Shively <ul style="list-style-type: none">• Review at the Local Level• Review by Indiana Board of Tax Review• Judicial Review by the Indiana Tax Court• Collateral Issues Involved in the Challenge• Review of Relevant Case Law
10:30 AM – 10:40 AM	Break	2:50 PM – 3:00 PM	Break
10:40 AM – 12:15 PM	Valuation Methods — C. David Matthews, MAI, CRE, SRA <ul style="list-style-type: none">• Methods of Valuation<ul style="list-style-type: none">– Cost Approach– Comparable Sales Approach– Income Approach– Selection of Proper Method(s)– Trending and How It Affects Assessments• Specific Properties and Issues<ul style="list-style-type: none">– Special Purpose Property– Special Techniques Allowed	3:00 PM – 3:30 PM	Property Tax Exemptions — Judge Les C. Shively <ul style="list-style-type: none">• Statutory Requirements• Submissions Necessary to Establish Exemption• Review of Recent Decisions
		3:30 PM – 4:00 PM	Recent Legislation — Cheryl Musgrave <ul style="list-style-type: none">• 2013 Legislation• Impact of 2011 Reassessment• Future Reassessments and Trending
		4:00 PM – 4:30 PM	Recent Court Cases — Judge Les C. Shively

Presented By:

C. David Matthews, MAI, CRE, SRA

- Appraised over 10,000 houses, millions of acres of farm land, thousands of commercial, multifamily and industrial properties worth billions of dollars
- Appraised in 16 states and given lectures dozens of times including in Canada, China and Russia on real estate valuation topics
- Formerly with the Stevenson County Illinois Supervisor of Assessments as the county property appraiser where he completed a full reappraisal of all real estate in the county for a new reassessment

Cheryl Musgrave

- Principal of Musgrave Consulting, LLC, offering services in property tax appeals and local government consulting
- Frequently consulted as a property tax expert by media sources

- Lectured recently at a USI master's degree course and given many property tax presentations throughout Indiana

Judge Les C. Shively

- Practiced law for 32 years until assuming the bench of the Vanderburgh Superior Court March 1, 2013
- Practice focuses on real estate, representing clients in administrative proceeding and litigation which concerned property rights; construction matters; development issues; property taxes; land use regulation; and contract disputes
- Served as a faculty member for numerous programs sponsored by the Indiana Continuing Legal Education Forum (ICLEF), including the Annual Real Estate Institute

For a complete list of accomplishments, visit www.lorman.com/ID391379.

Yes!
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FAX: 715-833-3953

MAIL: Mail this form with payment to:
Lorman Education Services
Dept. 5382, P.O. Box 2933
Milwaukee, WI 53201-2933

Where Is It?

Evansville Country Club
3810 Stringtown Road
Evansville, Indiana
812-425-2243

Who Should Attend?

This seminar is designed for accountants, controllers, tax managers and officers, real estate professionals and CFOs.

GENERAL INFORMATION:

- This seminar may be recorded by Lorman Education.
- If you need special accommodations, please contact us two weeks in advance of the program.
- Lorman Education Services is not approved to offer self-study CPE credit for accountants; therefore, no CPE will be given for this program if ordered as a self-study package.

CANCELLATIONS: Substitute registrants can be named at any time. A full refund, less a \$20 service charge, will be given if notification is given six or more business days in advance. Notification of less than six business days will result in a credit that can be applied to any Lorman products or services. If you do not cancel or attend, you are responsible for the entire payment.

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essential
strategies for
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