



# Historic Preservation Tax Incentive Program

## Step 1 Application to the Landmark Commission



## Application Requirements

- Completed Step 1 Application..... All requested information must be provided, and where necessary forms should be signed and notarized
- Estimated costs of rehabilitation ..... List of applicable expenses. Eligible expenses are listed in the General Information packet.
- Statement of Understanding ..... Signed and notarized by the property owner; use the form included in this packet.
- DCAD Account Information ..... Go to [www.dallascad.org](http://www.dallascad.org) then search for appraisals, search by address, search for the address of the property in question, and attached a copy of the account information to this application.
- Photographs of existing conditions..... Pictures taken of the structure prior to rehabilitation. Be sure to document the areas that will be rehabilitated.

## Additional Requirements

Check all statements that apply and please provide the information shown to the right for those items.

- Does the rehabilitation include any exterior work?..... Provide a copy of the front page of the Certificate of Appropriateness for the rehabilitation.
- Has the rehabilitation work already been completed? ..... In addition to this Step 1 Application, please submit the Step 2 - Application for Verification of Expenditures, as well as all of the required documentation.
- Has the property has received any previous tax relief? ..... Provide the documentation explaining the duration and amount of all previous tax relief.
- Is the property is in a TIF district? ..... Documentation of any additional tax incentives the property is set to receive, such as tax credits from the county, National Trust, grants, Texas Historic Commission or other entities. If you are unsure if the property is in a TIF district, check <http://maps.dallascityhall.com> and click on Economic Development.
- Is this an Urban Historic District exemption?..... Provide a breakdown of the square footage for residential, retail, commercial, and other nonresidential uses, number of jobs created, and residential units created in the proposed project.

## Additional Requirements (cont).

- Has the property had past code violations? ..... Contact the Code Compliance Department at 214-670-5708 if the property has had past code violations. An email from their department stating that the violations have been resolved will suffice.
- Is the owner not listed as the owner in DCAD records ..... Provide a copy of the property deed.
- Is the lot is a divided lot or split between several lots? ..... Provide a copy of the property deed.
- Is the property unplatted (no lot or block number)? ..... Provide a copy of the property deed.
- Is it is owned by a partnership, LLC, or other entity? ..... Provide a copy of the property deed or documentation that the signatory has the authority to sign on behalf of the entity.

# Historic Tax Exemption Application

## Step 1 – Application for a Certificate of Eligibility

### Property Information

Property Address: \_\_\_\_\_

Legal description: Lot \_\_\_\_\_ Block \_\_\_\_\_

Provide a metes and bounds attachment if no lot and block can be determined.

Building name (if applicable): \_\_\_\_\_

Historic district or pending historic district: \_\_\_\_\_

Year the historic structure was built: \_\_\_\_\_

Is this a contributing structure? \_\_\_\_\_

### Owner Information

Please list all of the property owner(s): \_\_\_\_\_

Mailing address: \_\_\_\_\_

City, state and zip code: \_\_\_\_\_

Phone number: \_\_\_\_\_ Fax number: \_\_\_\_\_

Email: \_\_\_\_\_

### Applicant Information (if different then the property owner)

Applicant name: \_\_\_\_\_

Mailing address: \_\_\_\_\_

City, state and zip code: \_\_\_\_\_

Phone number: \_\_\_\_\_ Fax number: \_\_\_\_\_

Email: \_\_\_\_\_

### Rehabilitation Information

Estimated Rehabilitation Investment: \_\_\_\_\_

Current Use: \_\_\_\_\_ Proposed Use: \_\_\_\_\_

For any exterior work, has a Certificate of Appropriateness (CA) been approved yet? \_\_\_\_\_

If not, when will the application for a CA be considered? \_\_\_\_\_

Projected Construction Time and Estimated Date of Completion: \_\_\_\_\_

**Lien Holder Information (if applicable)**

Primary mortgage company: \_\_\_\_\_

Contact person: \_\_\_\_\_

Correspondence address: \_\_\_\_\_

Secondary mortgage company: \_\_\_\_\_

Contact person: \_\_\_\_\_

Correspondence address: \_\_\_\_\_

Other lienholder: \_\_\_\_\_

Contact person: \_\_\_\_\_

Correspondence address: \_\_\_\_\_

**Financial Information**

The following information can be obtained from the Dallas Central Appraisal District website ([www.dallascad.org](http://www.dallascad.org) and click search for appraisals). The City of Dallas will use the tax values for the year prior to the application beings made.

The date this application is submitted to the city: \_\_\_\_\_

Improvement Value: \_\_\_\_\_

Land Value: \_\_\_\_\_

Has the Property Received Any Previous Tax Relief? If so, Please Explain: \_\_\_\_\_

Is this in a TIF District? (<http://maps.dallascityhall.com> and click Economic Development)? \_\_\_\_\_

\*\* Please attach a copy of the dallascad.org account information for the property to this application\*\*

**If Applying for an Urban Historic District Conversion Exemption**

Total Building Square Footage: \_\_\_\_\_

Retail Square Footage: \_\_\_\_\_

Office Square Footage: \_\_\_\_\_

Residential Square Footage: \_\_\_\_\_

Number of Jobs Created: \_\_\_\_\_

## Type of Exemption that is being applied for:

Category		Type	Required Expenditures	Amount	Duration	Renewable
<b>Urban Historic Districts</b> Includes all properties located within the Urban historic district area shown on the last page of the Information packet	<input type="checkbox"/>	Based on Rehab	75%	100%	10 years	Yes
	<input type="checkbox"/>	Based on Rehab	50%	Added Value	10 years	Yes
	<input type="checkbox"/>	Residential / ground floor conversion	50% must be converted to residential and 65% of ground floor must be converted to retail	100%	5 years	No

\*\* A Residential / Ground Floor Conversion exemption may be applied for in addition to an exemption Based on Rehab

Category		Type	Required Expenditures	Amount	Duration	Renewable
<b>Revitalizing Historic Districts</b> Includes properties located in: <ul style="list-style-type: none"> <li>• Junius Heights</li> <li>• Lakecliff</li> <li>• Peak's Suburban</li> <li>• South Blvd. / Park Row</li> <li>• 10<sup>th</sup> Street</li> <li>• Wheatley Place</li> <li>• Winnetka Heights</li> </ul>	<input type="checkbox"/>	Based on Rehab	25%	100%	10 years	Yes
	<input type="checkbox"/>	Maintenance	3%	Added Value	3 years	Yes

Category		Type	Required Expenditures	Amount	Duration	Renewable
<b>"Citywide"</b> Includes properties located in: <ul style="list-style-type: none"> <li>• Munger Place</li> <li>• State Thomas</li> <li>• Swiss Avenue</li> <li>• All properties not located within the Urban or Revitalizing historic districts</li> </ul>	<input type="checkbox"/>	Based on Rehab	50%	Added Value	10 years	Yes
	<input type="checkbox"/>	Endangered Property	25%	100%	10 years	Yes

Category		Type	Required Expenditures	Amount	Duration	Renewable
<b>Ownership by a non-profit entity open to the public</b>	<input type="checkbox"/>	Non-profit	Be a designated historic landmark that is open to the public and is owned by a non-profit with	100%	As long as the building is owned by a non-profit entity and is open to the public	Annually

PLEASE NOTE: All tax exemption approvals that accumulatively (new applications and renewals) will receive exemptions totaling in excess of \$50,000 will have to be approved by both the Landmark Commission and the City Council.

## Cost Estimates

The following list is a general guide to determine what may be used towards expenditures for the exemptions, which includes but is not limited to:

- |   |  |   |
|---|--|---|
| <ul style="list-style-type: none"> <li>● Architectural and engineering services if directly related to the eligible costs described above</li> <li>● Carpentry</li> <li>● Demolition and cleanup if directly related to the eligible costs described</li> <li>● Electrical</li> <li>● Elevators determined to be necessary to utilize the building</li> <li>● Exterior doors</li> <li>● Exterior brick veneers or treatments</li> <li>● Facade items</li> </ul> | <ul style="list-style-type: none"> <li>● Flooring</li> <li>● Foundation</li> <li>● Gutter where necessary for structural integrity</li> <li>● Heating and cooling</li> <li>● Interior work that becomes a permanent part of the building that will help preserve the structure</li> <li>● Mechanical</li> <li>● Painting (exterior and interior)</li> <li>● Porch</li> <li>● Plumbing</li> <li>● Rehabilitation of a contributing structure used for the required parking</li> </ul> | <ul style="list-style-type: none"> <li>● Roofing</li> <li>● Security and/or fire protection systems</li> <li>● Sheetrocking</li> <li>● Siding</li> <li>● Structural walls</li> <li>● Structural subfloors</li> <li>● Structural ceilings</li> <li>● Termite damage and treatment</li> <li>● Windows</li> <li>● Other items deemed necessary by the Landmark Commission that assist in preserving of the historic structure</li> </ul> |
|---|--|---|

Ineligible costs include, but are not limited to, the following:

- |  |  |   |
|--|--|---|
| <ul style="list-style-type: none"> <li>● Landscaping</li> <li>● Legal and accounting fees</li> <li>● Overhead</li> </ul> | <ul style="list-style-type: none"> <li>● Plumbing and electrical fixtures; provided, however, documented replacement of historic fixtures may be considered eligible</li> <li>● Purchasing tools</li> <li>● Repairs of construction equipment</li> </ul> | <ul style="list-style-type: none"> <li>● Supervisor payroll</li> <li>● Taxes</li> <li>● Any other items not directly related to the exterior appearance or the structural integrity or viability of the building</li> </ul> |
|--|--|---|

Briefly list the scope of work (attach a separate sheet of paper if necessary):

	Amount
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
6. _____	_____
7. _____	_____
8. _____	_____
9. _____	_____
10. _____	_____
<b>Total estimated expenditures of applicable costs:</b>	_____

PLEASE NOTE: Step 2 of this application process requires applicants to submit copies of receipts or other documentation, such as pay affidavits or schedules of value provided by a licensed architect or engineer proving that the required expenditure on rehabilitation has actually been made. Be sure to document your rehabilitation expenditures so that you can provide this information to the city when you apply for verification.

