



Historic Preservation Tax Incentive Program

Step 1 Application to the Landmark Commission

(Properties where part of the rehabilitation work has
been previously completed)



Application Requirements

- Completed Step 1 Application..... All requested information must be provided, and where necessary forms should be signed and notarized
- List of expenditures to date..... Please provide a chart, as shown later in this packet, listing the receipts and expenditure documentation submitted. Copies of the receipts should be submitted as backup documentation with this chart. A blank chart is attached to this form for your convenience.
- Backup documentation of expenditures spent to date..... 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. Please do not provide original documents, copies only.
- Estimated costs of rehabilitation yet to be completed 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 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 property has received any previous tax relief? Provide the documentation explaining the duration and amount of all previous tax relief.

Additional Requirements (cont).

- 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.

- 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 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
Urban Historic Districts 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
Revitalizing Historic Districts Includes properties located in: <ul style="list-style-type: none"> • Junius Heights • Lakecliff • Peak's Suburban • South Blvd. / Park Row • 10th Street • Wheatley Place • Winnetka Heights 	<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
"Citywide" Includes properties located in: <ul style="list-style-type: none"> • Munger Place • State Thomas • Swiss Avenue • All properties not located within the Urban or Revitalizing historic districts 	<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
Ownership by a non-profit entity open to the public	<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.

Record of expenditures for work that has already been completed

In order to qualify for the exemption, you must provide receipts or other documentation such as pay affidavits or schedules of value provided by a licensed architect or engineer proving that the required minimum expenditure on the approved rehabilitation work has been completed. The Landmark Commission may approve rehabilitation work completed up to three years prior to the Landmark Commissioner Certificate of Eligibility is approved.

Payment documentation must be recorded, labeled and totaled when submitted to staff.

Work completed prior to the Certificate of Eligibility application MUST be approved by the Landmark Commission. All expenditures you want to have counted towards your required threshold that have already been spent MUST be submitted with this application.

Please provide a chart, similar to the one shown below, summarizing the receipts and expenditure documentation submitted. Please keep the following in mind:

- Receipts, pay schedules, and bank withdraw transactions with work invoices are all acceptable methods of payment documentation.
- Copies of the payment documentation should be submitted as backup documentation with this chart.
- Payment documentation should be copied, please do not turn in originals.
- A pay schedule certified by a licensed architect or engineer may be submitted in lieu of this chart.

Please contact staff if you have a specific question on how to record a payment. A blank chart is attached to this form for your convenience.

- Provide the date of the payment
- List the name of the company to which the payment was made
- Provide the category of work completed, such as, plumbing, interior work, painting, foundation work, etc.
- Each receipt should be copied onto a sheet of paper. Please label each page with a page number. List the page number in the chart so that staff can correspond each receipt with the page on which the receipt is located. More than one receipt may be on a page.
- Provide the amount paid

1234 SAMPLE ADDRESS				
Date	Company	Type of Work	Receipt Page Number	Amount
9/30/2003	Lakewood Hardware	Plumbing	1	\$14.00
10/11/2003	The Restore	Exterior Doors	2	\$106.09
10/31/2003	Sam's Electric	Electrical work	2	\$40.68
12/27/2003	The Restore	Exterior Windows	3	\$201.59
1/5/2004	Home Depot	Floors	4	\$58.54
1/8/2004	Williams Concrete Inc	Foundation	5	\$160.21
3/10/2004	Porcelain Patch and Glaze	Purchase	6	\$400.00
3/16/2004	Craddock lumber Company	Cabinetry	6	\$121.67
3/25/2004	ICI Paints	Exterior House Paint	6	\$76.95
9/9/2005	Roofing Company	Roofing	7	\$320.27
TOTAL:				\$1,500.00

Record of expenditures for work that has already been completed

This form MUST be completed and submitted with this application. Only work that was approved by the Landmark Commission in the determination of eligibility counts towards meeting the minimum required expenditure. All receipts must be cataloged and totaled to qualify as a complete application. Receipts submitted without the attached form or an attached form similar to the one provided will be returned to the applicant. Pay affidavits or pay schedules may be submitted in lieu of this form.

Please either fill out the below chart or attach a chart similar to the one shown below to document the receipts being submitted to staff:

Date	Company	Category of Work	Receipt Page Number	Amount
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
TOTAL:				_____

When ALL of the rehabilitation has been completed, the applicant must submit the Step 2 application with the documentation demonstrating the additional expenditures spent after the Certificate of Eligibility approval.

Cost Estimates of work that has not yet been completed

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

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

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

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. _____	_____
Total estimated expenditures of applicable costs:	_____

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.

