



# Property Tax Agent Checklist

**Make sure you can count on your property tax agent, so your company can count on you.**

*Do you conduct an annual review of your property tax agents? Do you set standards and make sure your property tax agents are meeting your expectations?*

Whether you're in the market for a new property tax agent or you're just starting your search for one, there are certain qualities that only the best can claim. Having this checklist will help you determine if your current property tax agent is a good fit for your business, and it will assist in evaluating your agents to see where you might want to upgrade.

Finding partners (not just property tax agents) who can provide the reliable, expert service you need is an integral part of any healthy business. Use the checklist below to evaluate your current or potential property tax agents. This will highlight what's working, what's not, and if it's time to find someone new.

*Run through this checklist on each of your property tax agents to rate them on their effectiveness in supporting you and your company.*

## FREQUENCY OF UPDATES

*How often do I receive updates on property appeals? Do I have to prompt these updates?*

- 0 - I never know what's going on with this property tax agent.
- 1 - I can get an update, but only if I ask for one.
- 2 - I consistently get unprompted, regular updates on the status of my appeals.

## EASE OF COMMUNICATION

*Do I have a direct point-of-contact or will I be routed through a directory every time I call? Am I usually forced to leave a voicemail or send an email? Do I get timely responses to my requests for information? Do I end up talking to a person who doesn't really know what's going on?*

- 0 - I don't have a specific point of contact at this property tax agent firm.
- 1 - I have a point of contact, but they don't typically know the status and have to go check with others or do more research.
- 2 - I have a point of contact who provides timely responses to my requests for information (either on the phone or through email).

## COMMUNICATION WHEN THERE ARE PROBLEMS

*What is the communication process if appeals are missed or dismissed? Will I be alerted to those issues so I can plan accordingly? Does it feel like pulling teeth to get additional information when there are challenges, or are they sending new updates without prompting?*

- 0 - I don't get information from this property tax agent, even when an appeal is missed or dismissed.
- 1 - I typically get a response when a case is missed or dismissed, but I am given an excuse about why it was missed. The property tax agent does not provide a solution about how they intend to fix the mistake.
- 2 - I get immediate notice when an appeal is missed or dismissed and I am provided with the agent's plan and options to address the mistake at their own expense.

## PROPERTY TAX AGENT EXPERTISE

*Does my property tax agent have specialized knowledge in multifamily properties? Are they active members in local and national multifamily organizations?*

- 0 - I don't expect anyone at this property tax agency has any specialized knowledge about Texas multifamily properties. They are involved in multiple property tax types.
- 1 - I believe that this property tax agency is generally familiar with Texas multifamily properties, but multifamily is only a small portion of their work.
- 2 - I know this property tax agency has specialized knowledge about each property and the specific market and conditions they are facing. They are involved in multifamily organizations and focus on multifamily property types.

## INFORMATION REQUESTS

*When information is requested from me, am I given ample lead time? Is my property tax agent constantly putting me in a bind with last minute urgent requests? Do I know why my property tax agent is requesting certain information from me?*

- 0 - Information is frequently requested from me only days before the deadline. I have to put aside other important projects to rush information to the property tax agent or they might lose the appeal.
- 1 - I am given enough lead time to provide information, but I don't know why they want it or how it is being used. I am somewhat hesitant to give them so much confidential information.
- 2 - I am given plenty of lead time to provide information, and I know why my property tax agent is requesting it. They are clear about what they are looking for and how it will be used. I trust that my confidential information will be protected and honored.

## PROBLEM SOLVING MENTALITY

*How has this property tax agent dealt with challenges when appealing my property valuations? How do they manage limitations, such as lack of information, difficult assessors, difficult board members, new rules in the appeal process, or other issues that may arise in the appeal process?*

- 0 - I hear complaints from the county or property managers about how this property tax agent showed up and handled themselves on our behalf. They are having a negative impact on our reputation in the community.
- 1 - I never hear anything (good or bad) about how this property tax agent showed up on our behalf. I am not sure they are building our reputation in the community.
- 2 - I hear positive reports from my property managers on how they visited the property and the relationship they are building with them. They have a positive attitude and work through problems quickly and effectively. They build the relationship with the properties, assessors, and board members that increase our goodwill in the community.

## INVESTED IN MY SUCCESS

*Does it seem like this property tax agent is genuinely concerned about my properties and my company's success? Do they feel more like a partner than just a property tax agent?*

- 0 - I don't expect this property tax agent sees me or my company as anything other than a way to make money for themselves. I am just a number to them.
- 1 - I get this feeling from this property tax agent that they are casually interested in my success so that my company can grow into a larger customer for them.
- 2 - I believe that this property tax agent is invested in my success and they regularly look for ways to be helpful to me and my company.

## HAS THE CAPACITY TO MEET MY NEEDS

*Has this property tax agent demonstrated the capacity to meet our appeal deadlines? Do they accept new properties at the expense of giving proper care to my properties? Are they biting off more than they can chew and thereby only giving me a fraction of the service I deserve?*

- 0 - I feel like this property tax agent is stretched too thin. They are committing to me and missing their deadlines. I feel like they have too many properties and not enough time, and it is costing me in the form of higher taxes.
- 1 - I feel like this property tax agent can currently handle my properties, but I may be left with poor service when they find a new client and we become old news.
- 2 - I feel like a valued client. I know my property tax agent will put me first over taking on new clients. My property tax agent provides exceptional service to my properties and clearly has time to meet my needs.

## PHYSICAL SITE VISITS

*How often does my property tax agent visit my properties? Do they have a system to track the specifics of each property, and are they available to me? Do they know the amenities and the construction quality at each property?*

- 0 - I do not believe my property tax agent has ever visited my properties in person. They are familiar with my property from Google Earth or from a drive by.
- 1 - I think my property tax agent has visited some of my properties, maybe even all of them, but they do not have a regular schedule to come and inspect them. They do not have a way for me to see their notes or pictures.
- 2 - My property tax agent visits each of my properties annually and takes detailed site visit notes. The site visit notes and pictures are available to me. They know the amenities and the construction quality, down to the types of hinges we use in our cabinets.

## MARKET RESEARCH

*Has this property tax agent performed physical site visits at equitable properties to gather information about their amenities and construction quality? Can they walk me through what makes us similar or different and how to adjust the valuation for the appeal?*

- 0 - I do not believe my property tax agent has ever performed physical site visits at equitable properties on my behalf. They are far too busy to have time to visit anything extra.
- 1 - I have never heard of my property tax agent physically visiting equitable properties, but they do look at them online to adjust from information there.
- 2 - My agent performs physical site visits at the equitable properties and takes pictures for the appeal. They gather the same information they would at our site visits and store it for use in the appeal.

## SCORING YOUR PROPERTY TAX AGENT:

### 0-4: IT'S NOT YOU; IT'S YOUR PROPERTY TAX AGENT

Time to break-up with this property tax agent and move onto someone who cares about your success. This property tax agent is a burden on you and your bottom line. Regardless of their fee structure, you should definitely be evaluating new property tax agent options ASAP.

### 5-10: ROOM FOR IMPROVEMENT

This property tax agent has potential, but your company may not be on their radar. Either engage with them more, or seek other options. Don't settle for less than what you know your company deserves.

## 11-14: A PROMISING PARTNERSHIP

This property tax agent shows promise. They have the capability and concern to become an even better partner to your company. Communicate ways you think your partnership could improve to take it to the next level.

## 15-20: ROCKSTAR PROPERTY TAX AGENT ZONE

If your property tax agent scored this high, they are definitely great communicators, highly skilled, and partnering in your success. Stay engaged with them and show them how much you appreciate what they do for you!

## Don't Settle for less than a rockstar property tax agent.

When you have a hammer, everything looks like a nail. It is critical that you work with a property tax agent with expertise in the multifamily field and who knows the nuances of Texas property tax. If you want property tax reductions and don't want to end up on the front-page of the news, you have to have a partner that is most interested in the longevity of the relationship rather than only the next valuation reduction.

## Learn what you should look for in a quality property tax agent.

Working with Wayfinder Tax Relief, LLC is like adding an extension to your property tax department.

Wouldn't it be nice to have the control and convenience of an in-house multifamily specialized property tax agent without the hassle? That's exactly what you get when you partner with Wayfinder Tax Relief. Not only do we offer guaranteed annual site visits, constant communication, and specialized multifamily focus, but we also build relationships on your behalf in the communities where you have property.

*Our Wayfinder Guarantee ensures that you receive the level of attention to detail and representation you deserve, or it's free. That guarantee is currently unseen in the property tax industry.*

## Ready to get personalized service above industry standards and experience excellence with Wayfinder Tax Relief, LLC?

Get a quote to represent your properties at  
[www.WayfinderTaxRelief.com/ContactUs](http://www.WayfinderTaxRelief.com/ContactUs)