



## Welcome from TAAD's **New President**

I want to thank you for the opportunity to represent TAAD as President this year. I look forward to working closely with the many dedicated members of this organization. Our organization is only as strong and effective as the members who participate in its operations and activities. I appreciate all of you who will contribute to our success this year!

TAAD committees have formed and started to meet, notices have been mailed and the legislature is in full swing for what promises to be a long summer for all of us. I hope to get the opportunity to visit as many local chapters as possible during my year of service. If I can be of assistance to any of you, or if you have a suggestion you would like me to address with the executive board, please let me know.

Again, thank you for the opportunity to serve as the TAAD president and I look forward to meeting each and every one of you.

### Mark Price

Chief Appraiser, Brazos CAD  
2019 TAAD President



Mark Price, Brazos CAD  
2019 TAAD President



Rudy Durham, Denton CAD  
2018 TAAD President

## Farewell 2018 President **Rudy Durham**

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## **Congratulations To The TAAD Chief Appraiser Institute**

## **CLASS OF 2018**

These individuals have completed a series of intensive studies as a part of the requirements of the course.

**C. Brooks Barrett** Yoakum CAD

**Patrick Brogan** Harris CAD

**Don Causey** Nueces CAD

**Monica Chacon** Travis CAD

**Mark Cormier** Gregg CAD

**Shawn Davis**, Gillespie CAD

**David Oehler** Bee CAD

**Scott Dudley** Llano CAD

**Ryan Eime** Mitchell CAD

**Raul Garcia** Duval CAD

**Daniel Garcia** Brooks CAD

**Edward Garza** Frio CAD

**Michael Paul Griffiths** Polk CAD

**Patrick Harvey** Bexar AD

**Diane Josey** Garza CAD

**La Juan Lewis-Paris** Fort Bend CAD

**Chuck Lyon** Palo Pinto CAD

**Ashley Mayfield** Concho CAD

**Rebecca Norris** Lynn CAD

**Kevin Passons** Rockwall CAD

**Blaine Patterson** McMullen CAD

**Shanna Ramzinski** Caldwell CAD

**Ramiro Reza** Cameron CAD

**Richard Rodriguez** Bexar AD

**Rhonda Shaw** Reagan CAD

**Brenda Skrobarcek** Refugio CAD

**Clayton Snyder** Shackelford CAD

**Byron Stanley** Harris CAD

**Todd Tate** Kinney CAD

**Alfonso Venegas** Moore CAD

**Tahia Washington** Orange CAD

**William White** Bell CAD



# Thank You, 2019 TAAD Conference Sponsors!



## DIAMOND

Harris Govern	Thomson Reuters
Linebarger Goggan Blair & Sampson LLP	Tyler Technologies

## PLATINUM

Perdue Brandon Fielder Collins & Mott LLP	Sanborn Map Company
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## GOLD

BIS Consulting	Marvin F. Poer & Company	Pritchard & Abbott, Inc.
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EagleView Technologies	Nichols Jackson Dillard Hager & Smith LLP	Toyota Motor Manufacturing, TX Inc
Goode Casseb Jones Riklin Choate & Watson, PC	Olson & Olson, LLP	Valbridge Property Advisors
Hugh L. Landrum & Associates, Inc.	Popp Hutcheson, PLLC	

## SILVER

Alliance Tax Advisors	Donald Hicks, Sr., PC	Metropolitan Council of Appraisal Districts
ALN Apartment Data, Inc.	Evertson & Sanchez, PC	Morrison & Head, LP
American Property Services Inc.	Government Capital Corporation	Paradigm Tax Group
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Arthur P. Veltman & Assoc., Inc	Greer Herz & Adams, LLP	The Marshall Firm
Atmos Energy Corp.	Hegwood Group	Wardlaw Appraisal Group
Cantrell McCulloch, Inc	Kavoussi & Associates	
Compass Benefits	Low Swinney Evans & James, PLLC	

## BRONZE

ABIP	K.E. Andrews	RETC, LP
AdvaloremTax.net	Kurz Group, Inc.	Rosas Hugin, PLLC
Bexar County Sheriff's Office	Merit Advisors	Southwest Data Solutions
Blackwell & Duncan, PLLC	Meritax, LLC	Strategic Property Tax Advisors
Data Cloud Solutions, LLC	Newmark Knight Frank	TAAD Chapter of IAAO
Eccentex Corporation	P. E. Pennington & Company, Inc.	True Prodigy
Estes & Gandhi, PC	Paul Hornsby & Company	VariVerge
First Financial Bank NA	Pennington Hill, LLP	Watson Millican & Company
Geary Porter & Donovan	Point & Pay	Western Valuation & Consulting
HUB International	Property Tax Advocates, Inc.	

## SUPPORTER

Bruce Property Tax Solutions, LLC	D. Alan Bowlby & Associates, Inc	Pat Boone Attorney
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# 2018 TAAD Award Winners



**Deborah Wheeler**  
2018 Earl Luna Award Winner

## Earl Luna Award **Deborah Wheeler**

This year's Earl Luna Award winner is a name recognized by anyone and everyone in the ad valorem tax industry.

Our winner has more than 30 years of property tax experience. During that time she has taught property tax

courses, truth-in-taxation seminars and appraisal review board training all over the state of Texas. You may very well have been one of the folks she has assisted with questions about truth-in-taxation requirements and questions. She even spent some time as the executive director of an association with which you are all familiar!

Please join me in honoring this year's winner of the **Earl Luna Award** – Deborah Wheeler, Client Liaison for Perdue Brandon Fielder Collins & Mott.

### Previous Earl Luna Award Winners

2016	<b>Matt Tepper</b>	McCreary Veselka Bragg & Allen
2016	<b>Brent South</b>	Hunt CAD
2015	<b>Deborah Cartwright</b>	TTARA
2014	<b>Carla Pope-Osborne</b>	Perdue Brandon Fielder Collins & Mott
2013	<b>Dave Kimbrough</b>	Lubbock CAD ( <i>retired</i> )
2012	<b>Ed Trigg</b>	Wichita CAD ( <i>retired</i> )
2011	<b>Robert Mott</b>	Perdue Brandon Fielder Collins & Mott ( <i>retired</i> )
2010	<b>Jeff Craig</b>	Tarrant AD
2009	<b>Deborah Hunt</b>	Williamson CAD BOD ( <i>retired</i> )
2008	<b>Jim Childers</b>	Potter-Randall CAD ( <i>retired</i> )
2007	<b>Art Cory</b>	Travis CAD ( <i>retired</i> )
2006	<b>Michael Amezcuita</b>	Bexar AD
2005	<b>Jim Robinson</b>	Harris CAD ( <i>retired</i> )
2004	<b>Sands Stiefer</b>	Harris CAD ( <i>retired</i> )
2003	<b>John Marshall</b>	Tarrant AD ( <i>retired</i> )
2002	<b>Rick Kuehler</b>	Dallas CAD ( <i>retired</i> )
2001	<b>Buddy Winn</b>	Brazos CAD ( <i>retired</i> )
2000	<b>Rod Lewallen</b>	Callahan CAD ( <i>deceased</i> )
1999	<b>Charles Gaskamp</b>	Washington CAD ( <i>retired</i> )
1998	<b>Roy Holcomb</b>	Lee CAD ( <i>formerly</i> )
1997	<b>Dana Ripley</b>	Bastrop CAD ( <i>formerly</i> )
1996	<b>W. B. Criswell</b>	Lubbock CAD BOD ( <i>retired</i> )
1995	<b>Walter Stoneham</b>	Bexar AD ( <i>deceased</i> )
1994	<b>Michael Barnett</b>	Smith CAD
1993	<b>Sid Danner</b>	Cherokee CAD ( <i>retired</i> )
1992	<b>Bill Lovelady</b>	El Paso CAD BOD ( <i>deceased</i> )
1991	<b>Roland Bieber</b>	Jefferson CAD ( <i>retired</i> )
1990	<b>Bill Carroll</b>	Williamson CAD ( <i>retired</i> )
1989	<b>Ken Graeber</b>	Harris CAD ( <i>formerly</i> )
1988	<b>Jackie Self</b>	Kaufman CAD ( <i>retired</i> )
1987	<b>Richard Petree</b>	Taylor CAD ( <i>retired</i> )
1986	<b>James Archer</b>	Travis CAD ( <i>retired</i> )
1986	<b>Earl Luna</b>	Dallas CAD BOD ( <i>deceased</i> )

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**Terry Spradlin**  
2018 Excellence in Education Award winner

## James Goodwin Excellence in Education Award **Terry Spradlin**

This year, we honor someone who has been a part of TAAD's education program and has become an important person in the education of many Texas property tax professionals.

This individual has worked for appraisal districts since 1988. This wasn't the occupation he had imagined for himself, since the life of a draftsman or architect seemed more in line. However, the new entity called an "appraisal district" needed his talents sketching houses on property cards, and so a career was started.

He started life in Ohio, but got to Texas as soon as he could. It's a good thing he did, because a young lady who was to become the love of his life was waiting for him. They have been married for 32 years, and have two daughters who have made life lively by giving them 11 grandchildren.

He's the First Elder in his church, and outside of it teaches the three approaches to value to students across Texas.

This year's winner of the **James Goodwin Excellence in Education Award** – **Terry Spradlin, Commercial Division Manager for the Tarrant Appraisal District.**

### Previous Excellence in Education Award Winners

2016	<b>Marya Crigler</b>	Travis CAD
2016	<b>Mickey Hand</b>	Wise CAD
2015	<b>Tracey Landrum Foster</b>	Hugh Landrum & Associates
2014	<b>Roy Armstrong</b>	Armstrong & Armstrong, PC
2013	<b>Rick Stuart</b>	TEAM Consulting
2012	<b>Rick Kuehler</b>	Dallas CAD
2011	<b>Carla Pope-Osborne</b>	Perdue Brandon Fielder Collins & Mott
2010	<b>Deborah Cartwright</b>	Comptroller's Property Tax Assistance Division
2009	<b>Wayne Wilshire</b>	Tarrant AD ( <i>retired</i> )
2008	<b>Allen McKinley</b>	Trinity CAD
2007	<b>Michael Barnett,</b>	Smith CAD
2006	<b>Scott Howard</b>	McCreary Veselka Bragg & Allen
2005	<b>Board of Tax Professional Examiners</b>	
2004	<b>Richard Petree</b>	Taylor CAD ( <i>retired</i> )
2003	<b>Jeff Craig</b>	Tarrant AD
2002	<b>Sands Stiefer</b>	Harris CAD ( <i>retired</i> )
2001	<b>James Goodwin</b>	Ector CAD ( <i>posthumous presentation</i> )
2000	<b>Guy Griscom</b>	Harris CAD ( <i>retired</i> )
1999	<b>Rod Lewallen</b>	Callahan CAD ( <i>deceased</i> )
1998	<b>Big Country TAAD Chapter</b>	



## TAAD/IAAO Chapter President Letter

TAAD-IAAO Chapter Members:

I am extremely honored and excited to serve as the 2019 President of the TAAD-IAAO Chapter. A big thank you goes out to all those who attended our annual meeting in Austin this year. It was a pleasure seeing all of you there. I am grateful to the current IAAO President, Tim Boncoskey, for taking time out of his busy schedule to attend our meeting and address the group and swearing in our new officers. He commented on how impressed he is with the success of our chapter in such a short period of time. Let's keep that momentum going and continue to grow our chapter.

There is absolutely no reason Texas should not be the biggest and best chapter in all of the IAAO. I encourage you to continue to support the chapter through your membership this year and for many years to come. Our members are what make us great. I truly believe we have the best group of professionals in Texas that the appraisal industry has to offer.

IAAO certifications are highly respected in our industry and I would like to see more of us Texans achieve these designations over the next several years. Please take advantage of the chapter's scholarship program for those who are working on individual certifications or for CAD's working toward the CEAA designation for your organization. Our education committee will begin work soon to offer this year's slate of courses/seminars. Details of this will come soon.

Thank you again so much for putting your trust in me as your 2019 President. I look forward to a wonderful year.

Sincerely,

**Brent South**

TAAD-IAAO Chapter President



## Executive Director's Report for 2018

Delegate Assembly & Business Meeting, February 26, 2019

### *Highlights of 2018, a busy year for the Texas Association of Appraisal Districts, include:*

- » TAAD enjoyed the participation of **246** member appraisal districts.
- » TAAD's education program continued to develop and expand in 2018. We served **665** students in **30** state certification classes and six RPA Review classes in Austin. Although TDLR abolished "secondary sponsors" TAAD continues to assist its members in setting up education courses across the state to reach many more students, maintaining our commitment to help appraisal districts bring reasonably-priced education to their local area. The TAAD Education Committee planned 31 programs to reach all segments of the appraisal district population. Topics covered included Public Funds Investment Act training, ethics training, legislative updates, as well as numerous specialized appraisal seminars. TAAD offered online classes (new laws and rules, chief appraiser ethics and ethics) that reached 266. In addition, TAAD renewed a commitment to professional development of its members by assisting IAAO with their Instructor Relations Committee and by offering 18 courses and workshops. We continued to offer RPA review courses for registrants taking their licensing exams. For 2018, we served a total of **1,588** students through TAAD's education program.
- » We continued our **Chief Appraiser Institute**, designed to provide in-depth training to new and prospective chief appraisers. There were 32 individuals in the Class of 2018. We also conducted our second **Chief Appraiser Refresher**, a weeklong course for veteran chief appraisers and staff, that was attended by 18 CAs.
- » Approximately 677 individuals and more than 184 vendors attended TAAD's Thirty-seventh Annual Conference in Fort Worth last February. The Conference Committee continues to work on providing the best program, speakers and facilities possible for a reasonable price.
- » Preparing for the 2018 legislative session, TAAD's Legislative Committee worked to identify and pursue a list of legislative priorities, met with allied organizations to discuss possible mutual interests, and attended, as well as testified at, House and Senate committees.
- » TAAD's executive board has worked to meet its strategic plan, calling for developing and maintaining a sound education program for tax professionals; developing educational opportunities for member district support staff; evaluating and improving the program of the annual conference; increasing membership and member services, and working with legislators, related organizations and state leaders to maintain a legislative presence.

For 2019, the TAAD staff and I aim to do our best to continue to meet the needs of our membership. We will remember that each of you members, whether from a member district, or an associate, affiliate or retired member, are the most important reason for our being at TAAD. Please feel free to contact us at any time to share your concerns, questions and comments. At all times we will remember that TAAD exists to be of service to its members; please let us know how the staff and I can assist you and your appraisal district.

# 2019

TEXAS ASSOCIATION OF APPRAISAL DISTRICTS, INCORPORATED



## Committees

### 2019 Budget Committee

<i>Chair:</i> <b>Roland Altinger</b> , Harris CAD	<i>Vice Chair:</i> <b>Lisa Stephens-Musick</b> , Wichita CAD	
<b>Randy Clark</b> , Eastland CAD	<b>Chris Connelly</b> , Williamson CAD	<b>Rick Kuehler</b> , Dallas CAD
<b>Richard Molina</b> , Cameron CAD	<b>Brent South</b> , Hunt CAD	<b>Kathy Williams</b> , Denton CAD

### 2019 Bylaws Committee

<i>Chair:</i> <b>Christie Ussery</b> , Red River CAD	<i>Vice Chair:</i> <b>Dede Smith</b> , Throckmorton CAD	
<b>Jesse Blackmon</b> , Young CAD	<b>Cheryl Evans</b> , Brazoria CAD	<b>Priscilla Ginnetti</b> , Glasscock CAD
<b>Drew Hahn</b> , McLennan CAD	<b>Rick Medina</b> , El Paso CAD	<b>Scott Overton</b> , Orange CAD
<b>Clarette Walker</b> , Harris CAD		

### 2019 Conference Committee

<i>Chair:</i> <b>Michael Amezquita</b> , Bexar AD	<i>Vice Chair:</i> <b>George Clerihew</b> , Denton CAD	
<b>Adam Bogard</b> , Harris CAD	<b>Randy Clark</b> , Eastland CAD	<b>Jeff Craig</b> , Tarrant AD
<b>Jason Cunningham</b> , Harris CAD	<b>Dina Kilgore</b> , El Paso CAD	<b>Rick Kuehler</b> , Dallas CAD
<b>Carla Pope-Osborne</b> , Perdue Brandon Fielder Collins & Mott	<b>Roy Sandoval</b> , Bexar AD	<b>Lisa Stephens-Musick</b> , Wichita CAD
<b>Billy White</b> , Bell CAD		

### 2019 Education Committee

<i>Chair:</i> <b>Jason Cunningham</b> , Harris CAD	<i>Vice Chair:</i> <b>Mickey Hand</b> , Wise CAD	
<b>Stephen Atchison</b> , Harris CAD	<b>Chris Connelly</b> , Williamson CAD	<b>Jeff Craig</b> , Tarrant AD
<b>Marya Crigler</b> , Travis CAD	<b>Scott Griscom</b> , Bexar AD	<b>Scott Howard</b> , MVBA
<b>Mike Jones</b> , Fannin CAD	<b>Alvin Lankford</b> , Williamson CAD	<b>Bobby Peregoy</b> , Webb CAD
<b>Carla Pope-Osborne</b> , Perdue Brandon Fielder Collins & Mott	<b>Don Spencer</b> , Grayson CAD	<b>Sands Stiefer</b> , Olson & Olson



## 2019 Committees continued

### 2019 Industry Liaison Committee

<i>Chair:</i> <b>Shane Docherty</b> , Dallas CAD	<i>Vice Chair:</i> <b>Hugh Landrum</b> , Hugh L. Landrum & Associates	
<b>Angie Bellard</b> , Jefferson CAD	<b>Shawn Coker</b> , Grayson CAD	<b>Dan Conatser</b> , Wichita CAD
<b>Shawn Davis</b> , Gillespie CAD	<b>Cheryl Evans</b> , Brazoria CAD	<b>Lee Flowers</b> , Cherokee CAD
<b>Sandy Griffin</b> , Perdue Brandon Fielder Collins & Mott	<b>Paul Hornsby</b> , Paul Hornsby & Co.	<b>John Kennedy</b> , TTARA
<b>Rodney Kret</b> , Pritchard & Abbott, Inc.	<b>Ashley Mayfield</b> , Concho CAD	<b>Mitch McCullough</b> , Chambers CAD
<b>Shannon Murphy</b> , PTAD	<b>Jon Neely</b> , Capital Appraisal Group Inc.	<b>Patrick O'Connor</b> , O'Connor Consulting
<b>Doug Osterloh</b> , Thomas Y Pickett	<b>Shannon Stary</b> , Pritchard & Abbott, Inc.	<b>Tahia Washington</b> , Orange CAD

### 2018-2019 Legislative Committee

<i>Chair:</i> <b>Brent South</b> , Hunt CAD	<i>Vice Chair:</i> <b>Marya Crigler</b> , Travis CAD (Metro rep)	
<b>Roland Altinger</b> , Harris CAD	<b>Michael Amezcuita</b> , Bexar AD	<b>Michael Barnett</b> , Smith CAD
<b>Michelle Cardenas</b> , Atascosa CAD (TRCA rep)	<b>Gary Earnest</b> , Taylor CAD	<b>Kevin Kieschnick</b> , Nueces CAD BOD
<b>Alvin Lankford</b> , Williamson CAD (Metro rep)	<b>Jeff Law</b> , Tarrant AD	<b>Doug Smithson</b> , Cooke CAD (TRCA rep)
<b>Fred Hill</b> , Legislative Consultant		

### 2019 Membership Committee

<i>Chair:</i> <b>Dyann White</b> , Milam CAD	<i>Vice Chair:</i> <b>Christie Ussery</b> , Red River CAD	
<b>Maggie Duran</b> , Maverick CAD	<b>John Haliburton</b> , Victoria CAD	<b>Mickey Hand</b> , Wise CAD
<b>Kathy Rodrigue</b> , Ellis CAD		

### 2019 Nominations Committee

<i>Chair:</i> <b>Dinah Kilgore</b> , El Paso CAD	<i>Vice Chair:</i> <b>Brent South</b> , Hunt CAD	
<b>Mike Amezcuita</b> , Bexar AD	<b>Gary Earnest</b> , Taylor CAD	<b>Rick Kuehler</b> , Dallas CAD

### 2019 PTAD/TDLR Liaison Committee

<i>Chair:</i> <b>Jordan Wise</b> , Harris CAD	<i>Vice Chair:</i> <b>Shane Docherty</b> , Dallas CAD	
<b>Korry Castillo</b> , PTAD	<b>Terry Cavaness</b> , Tom Green CAD	<b>Mitch Fast</b> , PTAD
<b>Brian Francis</b> , TDLR	<b>Lacy Harris</b> , Perdue Brandon Fielder Collins & Mott	<b>Dana Horton</b> , Brazos CAD
<b>Jim Hudspeth</b> , Johnson CAD	<b>John Kennedy</b> , TTARA	<b>Barry Miller</b> , Brown CAD BOD
<b>Shannon Murphy</b> , PTAD	<b>Sands Stiefer</b> , Olson & Olson	<b>James Thompson</b> , El Paso CAD
<b>Debbie Wheeler</b> , Perdue Brandon Fielder Collins & Mott	<b>Dyann White</b> , Milam CAD	

## TAAD's 2019 State Certification Course Schedule

<i>Month</i>	<i>Course Number</i>	<i>Name</i>
<b>AUGUST 2019</b>		
August 12-14	Course 7	Property Tax Law
August 12-14	Course 10	Analyzing a Real Property Appraisal
August 12-16	Course 203	Sales Comp. Approach to Value/Cost Approach to Value
<b>SEPTEMBER 2019</b>		
September 16-19	Course 3	Income Approach to Value
September 16-19	Course 4	Personal Property Appraisal
September 16-19	Course 5	Mass Appraisal
<b>NOVEMBER 2019</b>		
November 18-20	Course 32	USPAP
November 20	Course 31	USPAP refresher
<b>DECEMBER 2019</b>		
December 2-4	Course 7	Texas Property Tax Law
December 2-5	Course 10	Analyzing a Real Property Appraisal
December 2-5	Course 3	Income Approach to Value
December 2-5	Course 4	Personal Property Appraisal
December 2-4	Course 101	Intro to Texas Property Tax System
December 4-6	Course 102	Intro to Appraisal
TBA	Course 8	Assessment and Collections
TBA	Course 28	Truth in Taxation
TBA	Course 9	Adv. Assessment and Collections

*course registration on next page*

# TAAD's 2019 State Certification Course Registration Form



1. **Class Hours:** Unless otherwise specified, course hours are from 8:30 am-5 pm.  
Registration on day one of class is 8-8:30 am.  
See TAAD website for course lengths.

2. **Hotel Accommodations/Class Location:**

- » **North Austin/Round Rock Marriott Hotel:** 2600 La Frontera Blvd.,  
Round Rock, TX 78681  
Lodging: 800.865.0546; \$123/night; call **at least three weeks** in advance  
for the TAAD block.
- » **TAAD Office:** 7700 Chevy Chase Dr., Bldg. 1, Ste. 425, Austin, TX 78752  
See TAAD website for lodging suggestions.

3. **Coupon:** All member districts will receive a coupon for \$50-off one Member District Course Fee each year. To redeem, please enclose original coupon with remaining fee.

5. **Class Materials:** Your class materials will be waiting for you at registration.  
If you want them sooner, select the appropriate check box below.

6. **Cancellations:** There will be a **\$75 fee** charged for cancellations. Written request for a refund must be received at TAAD at least seven days **before** class begins or entire registration is forfeited.

## Cost for Courses:

*Submit separate forms and fees for each course.*

<b>Course 30</b>	\$200 for TAAD Member Districts \$225 for TAAD Associate/Affiliate Members \$300 for Nonmembers
<b>Course 31</b> (hours reduced to 3.5 by TDLR)	\$75 for TAAD Member Districts \$150 for TAAD Associate/Affiliate Members \$200 for Nonmembers
<b>Courses 101, 102, 9, 28 or 32</b>	\$225 for TAAD Member Districts \$250 for TAAD Associate/Affiliate Members \$325 for Nonmembers
<b>Courses 3, 4, 5, 7 or 10</b>	\$300 for TAAD Member Districts \$325 for TAAD Associate/Affiliate Members \$400 for Nonmembers
<b>Course 8</b>	\$325 for TAAD Member Districts \$350 for TAAD Associate/Affiliate Members \$425 for Nonmembers
<b>Course 203</b> (previously 201 and 202)	\$400 for TAAD Member Districts \$425 for TAAD Associate/Affiliate Members \$475 for Nonmembers

Course # \_\_\_\_\_ Course Date \_\_\_\_\_ Course Location \_\_\_\_\_

Name \_\_\_\_\_ Nickname \_\_\_\_\_ TDLR # (if applicable) \_\_\_\_\_

Jurisdiction/Firm \_\_\_\_\_ Title \_\_\_\_\_

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

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone \_\_\_\_\_ Email address \_\_\_\_\_

*confirmations are sent by email*

## Course Materials (please mark one)

- ☐ Please **email** my class materials (student responsible for printing and bringing materials to class)
- ☐ I will **pick up** my class materials at registration
- ☐ Please **mail** my class materials. I have enclosed the \$10 shipping and handling fee.\*

*\*Materials mailed only if registration and payment are received **three weeks prior** to class.*

**Note: Property Assessment Valuation book is ordered directly from IAAO (iaao.org). (Required for Courses 201, 202, 3, 4 and 5.)**

Course Registration Fee..... Registration Fee .....\$ \_\_\_\_\_

PTEC Glossary - optional (\$20) ..... Enclosed .....\$ \_\_\_\_\_

Mail Course Materials - optional (\$10) ..... Enclosed .....\$ \_\_\_\_\_

Member District Certificate (must enclose with payment) ..... minus .....\$ \_\_\_\_\_

**TOTAL AMOUNT ENCLOSED \$ \_\_\_\_\_**

Please complete the registration form and return it along with payment to:

**TAAD | 7700 Chevy Chase Drive; Building One, Suite 425 | Austin, Texas 78752-1558**

## Office Use Only:

Coupon \_\_\_\_\_ Date \_\_\_\_\_ Check# \_\_\_\_\_ Paid \_\_\_\_\_

Glossary \_\_\_\_\_ Materials mailed \_\_\_\_\_ DB \_\_\_\_\_



## Texas Association of Appraisal Districts

### 2019 IAAO Course/Workshop Schedule



#### Course 300: Fundamentals of Mass Appraisal

April 22-26, 2019

Site: Harris CAD, 13013 Northwest Freeway, Houston

Instructor: Marion Johnson, CAE

Fees: TAAD member districts \$490

TAAD associate/affiliate members \$540

Nonmembers: \$625

TDLR credit: 30 hours

*Recommended prerequisites:* Course 101, 102

*AQB Approved: 33.50 CE with exam / 30 CE*

» *Recommended text: Fundamentals of Mass Appraisal textbook (FMA)* (obtain from IAAO)

#### Workshop 151: Uniform Standards of Professional Appraisal Practice (National)

September 3-4, 2019

Site: Harris CAD, 13013 Northwest Freeway, Houston

Instructor: Jordan Wise

Fees: TAAD member districts \$310

TAAD associate/affiliate members \$385

Nonmembers: \$475

TDLR credit: 15 hours

IAAO recertification credit: 15 hours-2 days

#### Workshop 191: Uniform Standards of Professional Appraisal Practice Update (National)

September 5, 2019

Site: Harris CAD, 13013 Northwest Freeway, Houston

Instructor: Jordan Wise

Fees: TAAD member districts \$220

TAAD associate/affiliate members \$275

Nonmembers: \$360

TDLR credit: 7 hours

IAAO recertification credit: 7 hours-1 day

#### Workshop 171: Standards of Professional Practice & Ethics

September 5, 2019

Site: Harris CAD, 13013 Northwest Freeway, Houston

Instructor: Guy Griscom, CAE

Fees: TAAD member districts \$220

TAAD associate/affiliate members \$275

Nonmembers: \$360

TDLR credit: 7 hours

IAAO recertification credit: 7 hours-1 day

#### Course 400: Assessment

Administration

October 7-11, 2019

Site: Denton CAD, 3911 Morse St., Denton

Instructor: Marion Johnson, CAE

Fees: TAAD member districts \$490

TAAD associate/affiliate members \$540

Nonmembers: \$625

TDLR credit: 30 hours

*Recommended prerequisite:* Course 101 and The Appraisal Foundation's Uniform Standards of Professional Appraisal Practice (USPAP)

» *Recommended text: Assessment Administration* (obtain from IAAO)

#### Course 300: Fundamentals of Mass Appraisal

October 28-November 1, 2019

Site: TAAD Office, 7700 Chevy Chase Drive, Bldg. One, Suite 425, Austin

Instructor: Rick Stuart, CAE

Fees: TAAD member districts \$490

TAAD associate/affiliate members \$540

Nonmembers: \$625

TDLR credit: 30 hours

*Recommended prerequisites:* Course 101, 102

*AQB Approved: 33.50 CE with exam / 30 CE*

» *Recommended text: Fundamentals of Mass Appraisal textbook (FMA)* (obtain from IAAO)

#### Course 101: Fundamentals of Real Property Appraisal

November 4-8, 2019

Site: Harris CAD, 13013 Northwest Freeway, Houston

Instructor: Marion Johnson, CAE

Fees: TAAD member districts \$490

TAAD associate/affiliate members \$540

Nonmembers: \$625

TDLR credit: 30 hours

*AQB Approved: 33.50 CE with exam / 30 CE no exam*

» *Recommended text: Property Assessment Valuation, 3rd edition* (obtain from IAAO)

*continued on next page*

## 2019 IAAO Course/Workshop *continued*

### Course 300: Fundamentals of Mass Appraisal

November 4-8, 2019

Site: McLennan CAD, 315 S. 26th Street, Waco

Instructor: Barry Couch, CAE

Fees: TAAD member districts \$490

TAAD associate/affiliate members \$540

Nonmembers: \$625

TDLR credit: 30 hours

*Recommended prerequisites:* Course 101, 102

*AQB Approved: 33.50 CE with exam / 30 CE*

» *Recommended text: Fundamentals of Mass Appraisal textbook (FMA)* (obtain from IAAO)

### Workshop 151: Uniform Standards of Professional Appraisal Practice *(National)*

November 4-5, 2019

Site: TAAD Office, 7700 Chevy Chase Drive, Bldg. One, Suite 425, Austin

Instructor: Jordan Wise

Fees: TAAD member districts \$310

TAAD associate/affiliate members \$385

Nonmembers: \$475

TDLR credit: 15 hours

IAAO recertification credit: 15 hours-2 days

### Workshop 191: Uniform Standards of Professional Appraisal Practice Update *(National)*

November 6, 2019

Site: TAAD Office, 7700 Chevy Chase Drive, Bldg. One, Suite 425, Austin

Instructor: Jordan Wise

Fees: TAAD member districts \$220

TAAD associate/affiliate members \$275

Nonmembers: \$360

TDLR credit: 7 hours

IAAO recertification credit: 7 hours-1 day

### Course 311: Residential Modeling Concepts

November 18 - 22, 2019

Site: Harris CAD, 13013 Northwest Freeway, Houston

Instructor: Barry Couch, CAE

Fees: TAAD member districts \$490

TAAD associate/affiliate members \$540

Nonmembers: \$625

TDLR credit: 30 hours

*Recommended prerequisite:* Course 300

### Course 102: Income Approach to Valuation

December 2-6, 2019

Site: Harris CAD, 13013 Northwest Freeway, Houston

Instructor: Brad Eldridge, CAE, MAI

Fees: TAAD member districts \$490

TAAD associate/affiliate members \$540

Nonmembers: \$625

TDLR credit: 30 hours

*Recommended prerequisite:* Course 101

*AQB Approved: 33.50 CE with exam / 30 CE no exam*

» *Recommended text: Property Assessment Valuation, 3rd edition* (obtain from IAAO)

### Course 334: Commercial Modeling Applications

December 9-13, 2019

Site: Harris CAD, 13013 Northwest Freeway, Houston

Instructor: Barry Couch, CAE

Fees: TAAD member districts \$490

TAAD associate/affiliate members \$540

Nonmembers: \$625

TDLR credit: 30 hours

*Recommended prerequisite:* Course 300, Fundamentals of Mass Appraisal textbook (FMA) (obtain from IAAO), a solid working knowledge of SPSS - 30 hours CE Course 101

»» *Student Requirements from IAAO:*

*This is a "hands on" class. Each attendee will be required to bring his/her own laptop loaded with Excel (2010 or later version) along with a power cord to class each day. A financial calculator will be helpful for the exam.*

*course/workshop registration on next page*

## TAAD 2019 IAAO Course/Workshop Registration Form

1. **Class Hours:** Unless otherwise specified, course hours are from 8:30 am - 5 pm. Registration on class day 1 is 8-8:30 am.

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2. **Location/Hotel Accommodations:** check TAAD's IAAO schedule for announced location.
  - » **Denton County Appraisal District**  
3911 Morse Street, Denton 76208
  - » **Harris County Appraisal District**  
13013 Northwest Freeway, Houston 77040
  - » **North Austin/Round Rock Marriott Hotel**  
2600 LaFrontera Blvd., Round Rock 78681
  - » **TAAD Headquarters**  
7700 Chevy Chase Drive, Bldg. One, Suite 425, Austin 78752
  - » **Travis Central Appraisal District**  
8314 Cross Park Drive, Austin 78754
 For lodging information, please contact TAAD or refer to TAAD's website for suggestions.

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3. **Registration Deadline:** IAAO requires class material to be ordered *at least three weeks prior to the course*, therefore TAAD must receive your registration at least three weeks prior to the course beginning. If you wish to register after this deadline, contact TAAD first to confirm availability.

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4. **Cancellations:** A \$100 administrative charge is deducted for cancellations. This includes faxed registrations. Refund requests must be received by TAAD *in writing no later than one week prior to the first day of the course*. There are no refunds for cancellations received by TAAD less than one week prior to first day of class.

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5. **Cost for Courses:** Please refer to TAAD's IAAO Schedule for registration cost. Registration cost is *based on TAAD membership*, not IAAO membership.

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6. **Course Materials:** Students will pick up course materials at registration on the first day of class.

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7. **Additional Texts:** Please refer to the registration materials for possible additional IAAO texts needed for the class. *Each student is responsible for ordering and obtaining them from IAAO*. No texts will be available at the class.

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8. **TDLR Credit:** TAAD will automatically report CE credit upon completion for students who provide a TDLR number on this form. Some IAAO courses may also count for TDLR Core Credit for those working toward RPA or RTA/C certification. To request Core Credit, *please contact TAAD directly prior to the class*.

---

IAAO Course/Workshop # \_\_\_\_\_ Course Dates \_\_\_\_\_ Course Location \_\_\_\_\_

Name \_\_\_\_\_ Nickname \_\_\_\_\_ TDLR # \_\_\_\_\_

Jurisdiction/Firm \_\_\_\_\_ Title \_\_\_\_\_

Mailing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone \_\_\_\_\_ Email Address \_\_\_\_\_

Course Registration Fee .....\$ \_\_\_\_\_  
(Fee is based on TAAD membership, not on IAAO membership)

**TOTAL AMOUNT ENCLOSED** .....\$ \_\_\_\_\_

Please complete the registration form and return it along with payment to:  
TAAD | 7700 Chevy Chase Drive; Building One, Suite 425 | Austin, Texas 78752-1558



Office Use Only:

Date \_\_\_\_\_ Check# \_\_\_\_\_ Paid \_\_\_\_\_ DB \_\_\_\_\_



# TAAD Legislative Update for TDLR New Laws/Rules CEs

Monday-Tuesday, August 19-20, 2019

San Antonio Marriott Rivercenter Hotel

101 Bowie Street; San Antonio, TX 78205



## Registration Fees: (Deadline: July 22)

- ☐ TAAD member district (per person) ..... \$275  
☐ TAAD associate/affiliate member ..... \$325  
☐ Non-member ..... \$400

## Guest Registration: (Deadline: July 22)

- ☐ TAAD member district ..... \$125

(no CEs; for spouse or companion of attendee;  
meals and breaks only; deadline: July 22)

## Seminar Location/Lodging

San Antonio Marriott Rivercenter Hotel

101 Bowie Street; San Antonio, TX 78205

\$185/single or \$189/double; call 877-622-3056 by  
July 27 for TAAD block rates.

Deadline for refund requests: August 9, 2019

## Tentative Seminar Schedule

### Monday

8:30-9	Registration
9-12	Information Sessions
12-1:15	Lunch (TAAD provides)
1:30-4:30	Information Sessions

### Tuesday

8-9	Breakfast (TAAD provides)
9-11:45	Information Sessions
11:45	Adjourn
1-3	(Tentative) CE Sessions

**CEs will be granted for attendance; final agenda  
will meet TDLR requirements for "law/rules  
update" needed by RPAs, RTAs, and RTCs.**

Name \_\_\_\_\_ TDLR number \_\_\_\_\_

Entity/Business \_\_\_\_\_

Mailing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone \_\_\_\_\_ E-mail Address \_\_\_\_\_

**TOTAL AMOUNT ENCLOSED\$** \_\_\_\_\_

**Registration fees must reflect current membership status.**

Requests for refunds must be in writing and submitted by August 9; a \$100  
cancellation fee will be deducted. No refunds for cancellations after August 9.

Please complete the registration form and return it along with payment to:

**TAAD | 7700 Chevy Chase Drive; Building One, Suite 425 | Austin, Texas 78752-1558**

**Office Use Only:**

Date \_\_\_\_\_

Ck# \_\_\_\_\_

Paid \_\_\_\_\_

PC \_\_\_\_\_

DB \_\_\_\_\_

## Real Estate Notes of Interest

*Rick Stuart, CAE*

*Rick is a Senior Consultant with TEAM Consulting and lives in Topeka, Kansas.*

**Symone Garvett, [www.builderonline.com](http://www.builderonline.com), February 14, 2019**

"Hardwood flooring has a long history, one that is said to date back to the 1600s. Like many home trends, it has gone in and out of style depending on interior design trends, the introduction of competing floor surfaces, and homeowner preferences. Today, hardwood flooring and hardwood look-alike products are on top once again. When homeowners were asked what kind of flooring they would choose for their dream home, 66 percent said hardwood floors, according to a recent survey conducted by the National Wood Flooring Association (NWFA)." <https://bit.ly/2Tlyze8>

**Portland Tribune, February 14, 2019**

"According to the Portland Tribune, a recent legislative hearing on a bill requiring Oregon cities to increase density in existing single-family neighborhoods is fueling discussion on both sides of the issue. "We are concerned that House Bill 2001 is a one-size-fits-all solution that won't actually fit any," said Erin Doyle, a lobbyist for the League of Oregon Cities. Kotek's measure would require cities of more than 10,000 and counties of more than 15,000 to allow a range of "missing middle" housing options in urban neighborhoods now zoned for single-family housing. The bill says this could include attached housing of up to four units, small cottages around a central courtyard or rules making it easier to subdivide existing housing." <https://bit.ly/2WZP48i>

**Houston Chronicle, February 15, 2019**

According to the Houston Chronicle, a report from the Houston Association of Realtors shows that home sales have been off for the past three months with the January volume falling 362 fewer closings as compared to last January. <https://bit.ly/2tnThF6>

**Steve Brown, [www.dallasmorningnews.com](http://www.dallasmorningnews.com), February 13, 2019**

"According to the Dallas Morning News, a report from the MetroTex Association of Realtors shows a rise in sales listings of more than 43 percent in January as compared to last year. Home sales in the area are down and price increases have come to a halt." <https://bit.ly/2NgGE8e>

**Wallet Hub, February 20, 2019**

"State capitals can be some of the best places to live in America, but not all capitals offer good housing attributes. To determine which of the 50 state capitals make the best home, WalletHub compared all of the capital cities across 54 indicators, including affordability, economic well-being, quality of education and health, and quality of life overall. **Congrats Austin for being #1!**" <https://bit.ly/2Xd7Skx>

**Nat Levy, [www.geekwire.com](http://www.geekwire.com), February 12, 2019**

"A federal appeals court sided with Zillow in a long-running lawsuit over the accuracy and marketing of the real estate giant's controversial Zestimate tool. The court found that Zillow is honest about labeling Zestimate as only an estimate, not an appraisal. The process is most accurate "when errors are not biased to favor sellers or buyers," so Zillow shouldn't have to change Zestimate values when they come in lower than what homeowners expect, Judge Frank Easterbrook wrote in the opinion." <https://bit.ly/2EjciMg>

**Jeff Collins, [www.ocreger.com](http://www.ocreger.com), February 19, 2019**

"Good news, America: The next recession may not appear in 2020, as a majority of economists long had forecast. Instead, the next downturn could be delayed until 2021 or later, making the current session of economic growth — now almost a decade old — the longest in U.S. history as of June. That's the view of three housing economists speaking Tuesday at the annual convention of the National Association of Home Builders (NAHB) in Las Vegas." <https://bit.ly/2IsPLni>

*continued on next page*

**Real Estate Notes** *continued***Lisa Brown, *www.globest.com*, February 27, 2019**

"Senate Bill 608, a measure that caps how much landlords can raise rents and stipulates how they may evict tenants, was passed by the House yesterday with a 35-25 vote after previously passing the Senate. Governor Kate Brown is expected to sign the legislation, making Oregon the first US state to cap how much landlords can raise rents. The bill prohibits landlords across the state from raising rents more than seven percent per year, plus the annual change in the consumer price index. It carves out an exemption for rental properties that are less than 15 years old."

<https://bit.ly/2XqOUHk>

***www.builderonline.com*, February 28, 2019**

"The 207,957 homes flipped in 2018 represented 5.6 percent of all single-family home and condo sales during the year, stagnant from 5.6 percent of all sales in 2017 but up from 5.1 percent of all sales back in 2008."

<https://bit.ly/2XupZm7>

***Philadelphia Inquirer*, March 11, 2019**

"According to The Inquirer, the Philadelphia District Attorney's office has filed charges on Robert Stokes, who lives in Philadelphia's Point Breeze neighborhood for stealing property from the deceased. Using forged deeds and notary stamps to illegally transfer the property to himself, Stokes is charged with 47 counts of forgery, theft, and tampering with records." <https://bit.ly/2NZCVfp>

***Sacramento Bee*, March 11, 2019**

"According to The Sacramento Bee, authorities have arrested a real estate agent after raiding seven homes in Chino, Chino Hills, and Ontario California that were being used to illegally grow marijuana. The million-dollar operation was being financed by funds wired in from China. Authorities seized over 1600 plants and \$80,000 in cash."

<https://bit.ly/2ToYlcr>

***Vincent Salandro, Remodeling*, March 25, 2019**

"Metal roofing is growing in popularity across the country, particularly in states that experience severe climate conditions, according to figures reported by the Metal Roofing Alliance (MRA). Florida, Pennsylvania, California, New York, and North Carolina are the top states for interest in metal roofing, the MRA finds, with Texas also showing strong interest." <https://bit.ly/2FxPLii>

***Kerry Curry, www.nreonline.com*, March 18, 2019**

"With late 2018 jitters gone and investor optimism returning, the commercial real estate market should experience mostly steady cap rates through the first half of 2019, although there are particular market segments and geographies that could experience some bumps." <https://bit.ly/2unez6r>

***Malena Carrola, Tampa Bay Times*, March 29, 2019**

"Roughly 62,000 Hillsborough County properties could soon have a new flood zone designation. The Federal Emergency Management Agency released new proposed flood maps for coastal parts of Hillsborough and Manatee counties. Updated for the first time in nearly 30 years, the maps better reflect the flooding risk homes and businesses face. "The biggest reason for doing (the update) is that technology has changed," said Mark Vieira, senior engineer at FEMA. "A lot more data goes into the study than it did 30 years ago."

**Editor's Note:** *I can envision this become commonplace throughout the United States.* <https://bit.ly/2CLhY3t>

***Boisestatepublicradio.org*, April 2, 2019**

**Editor's Note:** *The people of Boise and the area have been saying for years the influx continues to constantly increase, but this is at a new level.* "California is opening an office in Boise, Idaho to help its former citizens adapt? Yes, according to this report from Boise State Public Radio. Yes, hordes from the Bay to LA are descending on the Gem State at a shocking pace. So many transplants are relocating that California is set to open a learning center in downtown Boise for Golden State expats. "You know, we need to educate our people who are coming in that this is Idaho, you know — not California," says Christy Kelti." <https://bit.ly/2uJlDrA>

*continued on next page*



**Real Estate Notes** *continued***Tim Henderson, Stateline.org, March 30, 2019**

"The problem of housing affordability, long a concern in popular big cities, has officially moved to rural America. Nearly one-fourth of the nation's most rural counties have seen a sizable increase this decade in the number of households spending at least half their income on housing, a category the federal government calls "severely cost-burdened." Those counties, none with towns of more than 10,000 residents, have experienced housing cost increases significant enough to force families to scrimp on other necessities." <https://bit.ly/2CWYqJD>

**Builderonline.com, April 4, 2019**

"The U.S. median home listing price rose seven percent year-over-year in March and reached \$300,000 for the first time ever, according to realtor.com's March 2019 monthly housing trend report released today." <https://bit.ly/2lIRYiX>

**Zillow Research, April 3, 2019**

"In most major metropolitan areas in California, the cost of a home has risen so high that a household earning the local median annual household income — which is \$124,300 in San Jose and \$107,000 in San Francisco — would need to spend "far more" than 30 percent of its income on housing payments each month in order to make ends meet." <https://bit.ly/2VxZfzE>

**Dallas Morning News, April 4, 2019**

"According to the Dallas Morning News, a recent report by CoreLogic shows that home prices nationwide were up by four percent in February as compared to a year ago while prices in Ft. Worth for the same period were up 5.7 percent. Nearby in Dallas, prices went up by 3.96 percent. Overall the trend reflects a slowdown." <https://bit.ly/2G8GCx1>

**Builderonline.com, April 12, 2019**

"CoreLogic's® (NYSE: CLGX) monthly Loan Performance Insights Report shows that, nationally, four percent of mortgages were in some stage of delinquency (30 days or more past due, including those in foreclosure) in January 2019, representing a 0.9 percentage point decline in the overall delinquency rate compared with January 2018, when it was 4.9 percent. This was the lowest for the month of January in at least 20 years." <https://bit.ly/2lCdkeF>

**Dallas Morning News, April 11, 2019**

"The 10,298-acre Comanche Crest Ranch in Ft. Worth has been sold to an undisclosed buyer for \$13.5 million, the Dallas Morning News reports. The ranch was sold by the Icon Global Group of Dallas and is located on U.S. Highway 380 between the towns of Haskell and Throckmorton. The ranch didn't have anybody living on it but it does offer five fenced pastures, two dozen small lakes, and stock ponds." <https://bit.ly/2GIGCJ5>

**Houston Chronicle, April 11, 2019**

"March was good month for housing sales in the Houston area as a report from the Houston Association of Realtors shows 7,072 closings on single-family homes, a jump of nearly five percent as compared to last year, according to the Houston Chronicle." <https://bit.ly/2GeRUIG>

**KYTX, April 11, 2019**

"A builder in Texas is going the 3virtual4 home tour one better. He's building models of new homes with which the home buyer can experience the spatial elements, albeit in miniature. KYTX reports: Anwar Khalifa, president of Pyramid Homes is giving people a chance to not only build their dream home, but hold it in the palm of their hand with the help of his new 3D printer." <https://bit.ly/2De8uy8>

**Editor's Note:** *There is a short video with this article that is worth watching.*



Limited opportunity to attend TEAM's acclaimed AAS workshop.  
Save the date & register early!

## AAS Case Study Review Workshop

November 18–20, 2019 • Austin, Texas

### Workshop Topics:

- USPAP
- Rates and levies
- Effective tax rates
- Economic principles
- Property definitions
- Ownerships and rights
- Three approaches to value
- Attributes in an effective tax system
- Role of the assessor
- Ratio studies
- Tax policy
- Reassessment Planning
- Assessment Administration

*This is not an IAAO workshop but one developed by TEAM.*

TEAM Consulting LLC presents *AAS Case Study Review* on November 18–20, 2019, at the TAAD Office (Texas Assn. of Appraisal Districts) in Austin, Texas. This 2½-day workshop provides a review of materials and an understanding of the composition of a case study to help you prepare for the AAS Case Study Exam. The focus will be on the most prevalent items to study for but will not be all-inclusive of what may actually be on the exam.

Cost for the workshop is \$325. Included are multiple problems associated with the assessment administration and valuation processes. The workshop concludes with a 4-hour practice case study exam with answers provided. Find more information at [www.teamconsulting.cc/aasreview/aasworkshopschedule.html](http://www.teamconsulting.cc/aasreview/aasworkshopschedule.html)

For questions, contact Rick Stuart at [rstuart17@cox.net](mailto:rstuart17@cox.net) or 785.259.1379.

[www.teamconsulting.cc](http://www.teamconsulting.cc)

## Attorney General Opinions/Requests For Opinions

**KP-0238** (February 22, 2019) RE: Application of Government Code section 573.062, the nepotism continuous-employment exception, to a tax assessor-collector's sister-in-law (RQ-0243-KP)

**Summary:** Section 573.041 of the Government Code prohibits a public official from employing a person who is related to the public official by the specified degree of consanguinity or affinity. Section 573.062 excepts persons employed in a position for a specified continuous period of time prior to a relative's election or appointment to public office.

To the extent the tax office employs the sister-in-law in her current position for one year prior to the appointment of her relative as county tax assessor-collector, the sister-in-law's service satisfies the requirements under section 573.062 and her continued employment does not violate chapter 573 of the Government Code.

**KP-0239** (February 22, 2019) RE: Authority of a county to refund penalties and interest paid by taxpayers in certain circumstances (RQ-0244-KP)

**Summary:** Subsections 33.011(a)(1), (a)(3), and (d)

of the Tax Code permit a taxing unit under some circumstances to waive penalties and interest charged on delinquent taxes based on an act or omission of the taxing unit, or a formerly-correct address for payment, if certain requirements are met and the taxing unit receives a timely submitted written request for the waiver.

To the extent Hood County failed to mail a tax bill despite the County's possession of the taxpayer's mailing address, a court could conclude that the taxes are not yet delinquent, in which case the statutory deadline in subsection 33.011(d) for submitting the waiver request has not passed. To the extent Hood County mailed the tax bills in question such that a waiver of penalties and interest under section 33.011 is foreclosed, article III, subsection 52(a) of the Texas Constitution likely precludes the County from reimbursing taxpayers from its general fund for the amount of the penalties and interest.

**Request No. 0171-GA** RE: Whether a home-rule municipality may call an election to authorize a tax freeze when no petition has been submitted.

*Opinion requested by Honorable Frank Madla; Chair, Senate Intergovernmental Relations Committee*



## 2019 Executive Committee

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Brazos CAD

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Denton CAD

Editor: **Doris M. Koch**

TAAD Executive Director

dkoch@taad.org

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