



# Annual Property Tax Assessment Checklist

## Property Information Verification

Confirm accuracy of property details on tax records.

### Property Address

### Parcel Number

### Legal Description (brief)

### Number of Units (if applicable)

### Property Type

- ☐ Single Family
- ☐ Multi-Family
- ☐ Commercial
- ☐ Industrial
- ☐ Other

## Review Assessment Notice

Carefully examine the tax assessment notice for accuracy and potential errors.

### Assessment Notice Details

Write something...

### Assessed Value

Enter a number...

### Tax Rate

Enter a number...

### Estimated Property Tax Amount

Enter a number...

### Notice Date

Enter date...

### Notice Accuracy (Visual Inspection)

- ☐ Accurate
- ☐ Minor Discrepancy
- ☐ Significant Discrepancy

### Notes on Notice Review

Write something...

## Property Value Comparison

Compare the assessed value to market values and recent sales data.

### Assessed Property Value

Enter a number...

### Market Value (Estimate)

Enter a number...

### Comparable Sale Price 1

Enter a number...

### Comparable Sale Price 1 (Adjustment)

Enter a number...

### Comparable Sale Price 2

Enter a number...

### Comparable Sale Price 2 (Adjustment)

Enter a number...

### Property Type (for Comparison)

- ☐ Single-Family Home
- ☐ Condo/Townhouse
- ☐ Multi-Family
- ☐ Commercial

## Appeal Process Evaluation

Determine if an appeal is warranted based on assessment discrepancies.

### Is the assessed value significantly higher than comparable properties?

- ☐ Yes
- ☐ No
- ☐ Unsure

### Percentage difference between assessed value and market value (if known)

Enter a number...

**Briefly explain the reasons for considering an appeal.**

Write something...

**Have any recent property improvements significantly altered the value?**

☐ Yes

☐ No

☐ Not Applicable

**Date of recent appraisal (if available)**

Enter date...

## Documentation Gathering

Collect evidence to support any potential appeal (e.g., sales comps, appraisal).

**Recent Sales Comps (PDF)**

 Upload File

**Property Appraisal (if available)**

 Upload File

**Assessed Value**

Enter a number...

### Market Value (estimated)

Enter a number...

### Description of Discrepancies

Write something...

### Type of Evidence

- ☐ Sales Comps
- ☐ Appraisal
- ☐ Photographs
- ☐ Other

## Appeal Filing (if applicable)

Complete and submit the appeal form within the specified deadline.


### Reason for Appeal

- ☐ Assessment Discrepancy
- ☐ Market Value Discrepancy
- ☐ Unequal Assessment
- ☐ Error in Property Information

### Detailed Explanation of Appeal

Write something...

### Supporting Documents (Comps, Appraisal, etc.)

 Upload File

### Proposed Assessed Value

Enter a number...

### Date of Appeal Submission

Enter date...

### Authorized Signatory Signature

## Follow-Up & Communication

Track appeal status and communicate with the assessment office as needed.

### Appeal Hearing Date (if scheduled)

Enter date...

### Scheduled Call Time with Assessment Office

### Communication Method

- ☐ Email
- ☐ Phone
- ☐ Mail

### Summary of Communication with Assessment Office

Write something...

### Reference/Case Number (if assigned)

Enter a number...

### Date of Last Communication

Enter date...

## Record Keeping

Maintain all records related to the assessment and any appeal.

### Summary of Assessment Findings

Write something...

### Copy of Assessment Notice

 Upload File

### Date of Assessment Notice Received

Enter date...



**Supporting Documentation (e.g., Sales Comps)**

 Upload File

**Assessment ID/Account Number**

Enter a number...

**Notes on Communication with Assessment Office**

Write something...