



STRUCTURE PRESERVATION TAX EXEMPTION

PLANNING AND ZONING DEPARTMENT
CITY OF ROCKWALL, TEXAS
385 S. GOLIAD STREET
ROCKWALL, TEXAS 75087
PHONE: (972) 771-7748

STAFF USE ONLY	
RECEIVED BY (INITIALS)	DATE RECEIVED
PROPERTY ZONING	
INSPECTION DATE (W/IN 30 DAYS)	
DIRECTOR'S SIGNATURE	

1.1 PROPERTY OWNER INFORMATION [PLEASE PRINT]

OWNER(S) NAME

ADDRESS

PHONE

E-MAIL ADDRESS

1.2 ADDRESS OF PROPERTY BEING CONSIDERED [PLEASE PRINT]

ADDRESS

1.3 HISTORIC DISTRICT

- OLD TOWN ROCKWALL HISTORIC DISTRICT
- SOUTHSIDE OVERLAY DISTRICT
- DESIGNATED LANDMARKED PROPERTY

1.4 STATEMENT OF COST

TOTAL COST FOR THE RESTORATION OR REHABILITATION WORK \$

NOTE: DOCUMENTATION OF COST SHALL BE SUBMITTED WITH THE SWORN COMPLETION.

1.6 STATEMENT OF TIME FOR THE RESTORATION OR REHABILITATION

CONSTRUCTION WILL BEGIN ON

CONSTRUCTION WILL BE COMPLETED ON (ESTIMATED)

1.5 SUBMITTAL CRITERIA CHECKLIST

- LEGAL DESCRIPTION
- PROOF OF TITLE
- TAX CERTIFICATE
- CONSTRUCTION PLANS
- OWNER'S AFFIDAVIT *

* FOR MORE INFORMATION ON THE OWNER'S AFFIDAVIT PLEASE REFER TO THE BACK OF THIS APPLICATION.

1.7 SCOPE OF WORK

IF THE PROPERTY WILL BE USED FOR COMMERCIAL, USES PROVIDE A DETAILED STATEMENT OF THE PROPOSED USE FOR THE PROPERTY. OTHERWISE, INDICATE THAT THE PROPERTY WILL BE USED FOR RESIDENTIAL, SINGLE FAMILY USES. IN ADDITION PLEASE PROVIDE ANY ADDITIONAL INFORMATION THAT MAYBE HELPFUL TO STAFF IN EVALUATING THIS REQUEST.

1.8 OWNER'S ACKNOWLEDGEMENTS [INITIAL AND SIGN BELOW]

I AUTHORIZE REPRESENTATIVES OF THE CITY OF ROCKWALL TO VISIT AND INSPECT THE PROPERTY AND THE RECORDS AND BOOKS OF THE OWNER AS NECESSARY TO CERTIFY THAT THE PROPERTY IN QUESTION IS IN SUBSTANTIAL NEED OF RESTORATION OR REHABILITATION.

I ACKNOWLEDGE MY FUTURE OBLIGATION TO NOTIFY THE DIRECTOR OF PLANNING & ZONING UPON THE COMPLETION OF THE PROPOSED PROJECT, AND PROVIDE A SWORN STATEMENT OF COMPLETION. THIS WILL BEGIN THE VERIFICATION PROCESS NOTED IN SECTION 25.4 OF ORDINANCE 03-28, WHICH IS STATED ON THE BACK OF THIS APPLICATION.

I HEREBY ATTEST THAT THE INFORMATION THAT I HAVE PROVIDED IS, TO THE BEST OF MY KNOWLEDGE, CORRECT AND TRUE, AND THAT I OWN THE PROPERTY DESCRIBED ABOVE OR THAT I AM LEGALLY THE AUTHORITY IN CHARGE OF THE PROPERTY. I ALSO UNDERSTAND THAT, IF THE REQUESTED EXEMPTION IS GRANTED, I HAVE ENTERED INTO A COVENANT WITH THE CITY OF ROCKWALL IN WHICH I MUST AGREE TO MAINTAIN THE CHARACTER OF THE PROPERTY AND THE QUALIFYING IMPROVEMENTS FOR THE TERM OF THE EXEMPTION.

OWNER'S SIGNATURE

DATE



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PURPOSE

ORDINANCE 03-28 APPROVED ON SEPTEMBER 3, 2003 WAS ENACTED TO PROVIDE AN AD VALOREM TAX EXEMPTION FOR STRUCTURES IN NEED OF TAX RELIEF FOR THE PURPOSE OF ENCOURAGING TAX RELIEF WITHIN CERTAIN HISTORIC DISTRICTS WITHIN THE CITY. SPECIFICALLY, THIS ORDINANCE IS APPLICABLE TO STRUCTURES WITHIN THE SOUTHSIDE RESIDENTIAL NEIGHBORHOOD OVERLAY (SRO) DISTRICT, THE OLD TOWN ROCKWALL HISTORIC DISTRICT AND PROPERTIES THAT ARE DESIGNATED AS LANDMARKS. THE FOLLOWING SECTIONS ARE EXCERPTS FROM THE ORDINANCE TO CLARIFY THE PROCESS OF SEEKING A TAX EXEMPTION.

§ 25 – 39: STRUCTURE PRESERVATION TAX EXEMPTION

A RESIDENTIAL BUILDING OR DESIGNATED LANDMARK PROPERTY WHICH MEETS THE REQUIREMENTS OF THIS ORDINANCE SHALL BE CERTIFIED BY THE DIRECTOR OF COMMUNITY DEVELOPMENT TO HAVE THE ASSESSED VALUE FOR AD VALOREM TAXATION "FROZEN" AS DESCRIBED AND LISTED BELOW IN ORDER TO QUALIFY FOR AD VALOREM TAX EXEMPTION. THE ASSESSED VALUE SHALL BE FROZEN AT THE VALUE FOR THE TAX YEAR IN WHICH THE INCREMENT PROJECT WAS COMPLETED. THE ASSESSED VALUE OF THE IMPROVEMENT SHALL BE SO "FROZEN" IN ACCORDANCE WITH THE SCHEDULE BELOW:

THE PERIOD OF THE TAX ABATEMENT SHALL BE FIVE (5) YEARS IF THE AMOUNT OF THE INCREMENT PROJECT IS \$5,000 OR GREATER; OR THE PERIOD OF THE TAX ABATEMENT SHALL BE SEVEN (7) YEARS IF THE AMOUNT OF THE INCREMENT PROJECT IS EQUAL TO OR EXCEEDS 25% OF THE ASSESSED VALUE OF THE IMPROVEMENT ON JANUARY 1ST OF THE YEAR THE INCREMENT PROJECT WAS COMPLETED.

FURTHERMORE, THIS EXEMPTION SHALL BEGIN ON THE FIRST DAY OF THE NEXT TAX YEAR AFTER VERIFICATION OF COMPLETION OF THE PRESERVATION REQUIRED FOR CERTIFICATION; PROVIDED THAT: THE BUILDING SHALL COMPLY WITH THE APPLICABLE ZONING REGULATIONS FOR ITS USE AND LOCATION; AND

§ 25 – 40: APPLICATION PROCESS (C) [OWNER'S AFFIDAVIT]

- C) INCLUDE AN AFFIDAVIT BY THE OWNER DESCRIBING THE STRUCTURE IN NEED OF TAX RELIEF AND ITS COMPLIANCE WITH THE REQUIREMENTS OF SECTION 25 - 39 HEREIN;

§ 25 – 41: CERTIFICATION PROCESS

WITHIN 30 DAYS AFTER RECEIPT OF THE PROPERLY COMPLETED APPLICATION, THE CITY SHALL MAKE AN INVESTIGATION OF THE PROPERTY AND SHALL CERTIFY THE FACTS TO THE DIRECTOR OF COMMUNITY DEVELOPMENT ALONG WITH THE DOCUMENTATION AND RECOMMENDATION FOR APPROVAL OR DISAPPROVAL.

UPON RECEIPT OF A RECOMMENDATION, THE DIRECTOR OF COMMUNITY DEVELOPMENT SHALL IMMEDIATELY FORWARD THE APPLICATION TO THE ROCKWALL CITY COUNCIL AND, WITHIN THIRTY (30) DAYS, THE COUNCIL SHALL CONSIDER APPROVAL OR DISAPPROVAL ELIGIBILITY OF THE PROPERTY FOR TAX RELIEF PURSUANT TO THIS ORDINANCE. IN DETERMINING ELIGIBILITY, THE CITY COUNCIL SHALL FIRST DETERMINE THAT ALL THE REQUIREMENTS OF THIS ORDINANCE HAVE BEEN MET AND THAT ONLY THE STRUCTURE IS TO BE PROVIDED FAVORABLE TAX RELIEF AS PROVIDED IN SECTION II HEREIN. WRITTEN NOTICE OF THE DETERMINATION SHALL BE SENT TO THE APPLICANT.

§ 25 – 42: VERIFICATION PROCESS

UPON COMPLETION OF THE ENHANCEMENT OF A STRUCTURE, THE CERTIFIED APPLICANT SHALL SUBMIT A SWORN STATEMENT OF COMPLETION ACKNOWLEDGING THAT THE PROPERTY HAS BEEN SUBSTANTIALLY REHABILITATED OR RESTORED. WITHIN (30) DAYS AFTER RECEIPT OF THE SWORN STATEMENT OF COMPLETION, THE DIRECTOR OF COMMUNITY DEVELOPMENT SHALL MAKE AN INVESTIGATION OF THE PROPERTY AND SHALL DETERMINE IF THE ENHANCEMENT HAS BEEN COMPLETED AS REQUIRED FOR CERTIFICATION. IF THE ENHANCEMENT IS DEEMED INCOMPLETE, THE APPLICANT SHALL BE REQUIRED TO COMPLETE THE ENHANCEMENT IN ORDER TO SECURE THE TAX EXEMPTION. IF THE ENHANCEMENT IS DETERMINED TO BE COMPLETE, THE DIRECTOR OF COMMUNITY DEVELOPMENT SHALL NOTIFY THE CHIEF APPRAISER OF THE ROCKWALL COUNTY CENTRAL APPRAISAL DISTRICT IN WRITING THAT THE APPLICABLE AD VALOREM TAX EXEMPTION SHALL APPLY.