



**Invitation to Bid  
RFP 2010-BF-1**

**2010 Broward County Property  
Appraiser Exemption/Classification and Personal  
Property Mailings**

**For Information Contact:**

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**[www.bcpa.net](http://www.bcpa.net)**

The Broward County Property Appraiser, a constitutional office established under the Laws of Florida, (herein after the BCPA), will receive bids from individuals, corporations, partnerships, and other legal entities organized under the laws of the State of Florida or authorized to conduct business in the State of Florida.

**TIME AND DATE DUE: Bids will be received until November 12, 2009 at 12:00 pm (noon) at which time they will all be publicly opened.** All interested parties are invited to attend this opening.

CONTENTS OF THIS REQUEST FOR BID:		Page
Section A: Information to Bidders		3
Section B: Form of Bid		8
Section C: Scope of Services and General Specifications		10
Section D: Bid Signature Form		19
Attachment A:	Drug Free Work Place Certification	23
Attachment B:	Crimes Certification	26
Attachment C:	Samples	28

**Important note: A prohibition of lobbying has been enacted.  
Please review paragraph A.17 carefully to avoid violation and possible sanctions.**

## SECTION A: INFORMATION TO BIDDERS

BIDDERS MUST COMPLY WITH THE FOLLOWING INSTRUCTIONS TO BE CONSIDERED FOR SELECTION.

### A.01 OPENING LOCATION

The bids will be publicly opened in the Broward County Property Appraiser's office, 115 S. Andrews Avenue, Room 111, Ft. Lauderdale, Florida, in the presence of the BCPA or her designee and the Director of Finance, Budget and Tax Roll Management at the time and date stated. All bidders or their representatives are invited to be present.

### A.02 BID FORM DELIVERY REQUIREMENTS

Any bids received after the stated time and date will not be considered. It shall be the sole responsibility of the bidders to have their bid delivered to the BCPA for receipt on or before the stated time and date. If a bid is sent by U.S. Mail, the bidder shall be responsible for its timely delivery. Bids delayed by mail shall not be considered, shall not be opened at the public opening, and arrangements shall be made for their return at the bidders' request and expense.

### A.03 CLARIFICATION AND ADDENDA

Each bidder shall examine all Invitation to Bid documents and shall judge all matters relating to the adequacy and accuracy of such documents. Any inquiries, suggestions or requests concerning interpretation, clarification or additional information pertaining to the Request to Bid shall be made through the BCPA's Director of Finance, Budget and Tax Roll Management. The BCPA shall not be responsible for oral interpretations given by any employee of the BCPA, representative, or others. The issuance of a written addendum is the only official method whereby interpretation, clarification or additional information can be given. If any addenda are issued to this Bid, the BCPA will attempt to notify all prospective bidders who have secured same. However, it shall be the responsibility of each bidder, prior to submitting their bid, to contact the Director of Finance, Budget and Tax Roll Management to determine if addenda were issued and to make such addenda a part of their bid.

### A.04 SEALED & MARKED

One (1) original signed bid, signed in blue ink, and one (1) copy of your bid shall be submitted in one sealed package, clearly marked on the outside "Sealed Bid #RFP 2010-BF-1" and addressed to:

Ron Gunzburger, General Counsel  
Broward County Property Appraiser  
115 S Andrews Avenue, Room 111  
Fort Lauderdale, FL 33301

A.05   LEGAL NAME

Bids shall clearly indicate the legal name, address and phone number of the bidder (company, firm, and partnership, individual). Bids shall be signed above the typed or printed name and title of the signer. The signer must have the authority to bind the bidder to the submitted bid.

A.06   BID EXPENSE

All expenses for making bids to the BCPA are to be borne by the bidder.

A.07   DISCLOSURE

Upon receipt, responses become public records and shall be subject to public disclosure as required by Chapter 119, Florida Statutes.

A.08   RESERVED RIGHTS

The BCPA reserves the right to accept or reject any and/or all bids, in whole or in part, to waive irregularities and technicalities, and to request resubmission. Any sole response received by the first submission date may or may not be rejected by the BCPA depending upon available competition and timely needs of the BCPA. The BCPA reserves the right to award the contract to a responsible bidder submitting a responsive bid, with a resulting negotiated agreement which is most advantageous and in the best interests of the BCPA. The bid price is a significant factor considered by the BCPA in the award of the contract, but, other relevant factors in the response are also considered. The BCPA shall be the sole judge of the Bid, and the resulting negotiated agreement that is in its best interest and its decision shall be final. Also, the BCPA reserves the right to make such investigation as it deems necessary to determine the ability of any bidder to perform the work or service requested. Information the BCPA deems necessary to make this determination shall be provided by the bidder. Such information may include, but shall not be limited to: current financial statements prepared by an independent CPA; verification of availability of equipment and personnel; and past performance records.

A.09   APPLICABLE LAWS

Bidders must be authorized to transact business in the State of Florida. All applicable laws and regulations of the State of Florida and ordinances and regulations of Broward County will apply to any resulting agreement. A protest with respect to this Invitation to Bid shall be submitted in writing prior to the scheduled opening date of this bid, unless the aggrieved person did not know and could not have been reasonably expected to have knowledge of the fact giving rise to such protest prior to

the scheduled opening date of this bid. Any protest shall be submitted within six calendar days after such aggrieved person knows or could have reasonably been expected to know of the facts giving rise thereto.

#### A.10 CODE OF ETHICS

With respect to this bid, if any bid violates or any bidder is a party to a violation of the State of Florida Code of Ethics for Public Officers and Employees per Florida Statutes, Chapter 112, Part III, such bidder may be disqualified from furnishing the goods or services submitted and shall be further disqualified from submitting any future bids for work or for goods or services for the BCPA.

#### A.11 COLLUSION

By offering a submission to this Invitation to Bid, the bidders certify they have not divulged, discussed, or compared their bid with other bidders, and have not colluded with any other bidder(s) or parties to this bid whatsoever. Also, all bidders certify, and in the case of a joint bid each party certifies as to its own organization that in connection with this bid:

- a. any prices and/or data submitted have been arrived at independently, without consultation, communication or agreement, for the purpose of restricting competition, as to any matter relating to such prices and/or cost data with any other bidder or with any competitor;
- b. any prices and/or cost data quoted for this bid have not been knowingly disclosed by the bidder prior to the scheduled opening directly or indirectly to any competitor;
- c. no attempt has been made or will be made by the bidder to induce any other person or firm to submit or not to submit a bid for the purpose of restricting competition;
- d. the only person or persons interested in this bid as principal or principals is/are named therein and that no person other than therein mentioned has any interest in this bid or in the contract to be entered into; and
- e. No person or agency has been employed or retained to solicit or secure this contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, excepting bona fide employees.

#### A.12 BID FORMS

Bids must be submitted in the format specified in Section B hereof. Additional support information may be included.

#### A.13 DISCOUNTS

Any and all discounts must be incorporated into the prices contained in the bid and not shown separately. The prices as shown on the bid form shall be the prices used in helping to determine award.

#### A.14 TAXES

The BCPA is exempt from any and all taxes. A tax Exempt Certificate will be supplied to the successful bidder upon request. Therefore, the bidder is prohibited from delineating a separate line item in their bid for any sales or service taxes. Nothing herein shall affect the bidder's normal tax liability.

#### A.15 MATHEMATICAL ERRORS

In the event of multiplication/extension error(s), the unit price shall prevail. In the event of addition error(s), the extension totals will prevail. All bids shall be reviewed mathematically and corrected, if necessary, using these standards, prior to additional evaluation.

#### A.16 AMERICANS WITH DISABILITIES ACT

The BCPA does not discriminate upon the basis of any individual's disability status. This non-discrimination policy involves every aspect of the BCPA's functions including one's access to, participation, employment, treatment in its programs or activities.

#### A.17 LOBBYING

After the issuance of any Invitation to Bid, prospective bidders or any agent, representative or person acting at the request of such bidder shall not contact, communicate with or discuss any matter relating in any way to the Invitation to Bid with any officer, agent or employee of the BCPA other than the Director of Finance, Budget and Tax Roll Management or as directed in the Request to Bid. This prohibition begins with the issuance of any Request to Bid, and ends upon execution of the final contract or when the request has been canceled.

#### A.18 PUBLIC ENTITY CRIMES

In accordance with Section 287.133, Florida Statutes, a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a

public entity for the construction or repair of a public building or public work, may not submit bids on leases or real property to a public entity, may not be awarded or perform work as a contractor, supplier, or subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017 for Category Two (\$25,000) for a period of 36 months from date of being placed on the convicted vendor list.

#### A.19 DRUG-FREE WORKPLACE

The BCPA adopted a policy regarding bidders maintaining a drug-free workplace. This policy prohibits the award of bids to any person or entity that has not submitted a written certification to the BCPA that it has complied with those requirements. A Drug-Free Workplace Certification form is attached for this purpose.

#### A.20 EQUAL EMPLOYMENT OPPORTUNITY

The BCPA, in accordance with provisions of Title VII of the Civil Rights Act of 1964 and the regulations of the Department of Commerce (15 CFR, Part 8) issued pursuant to such Act, hereby notifies all prospective bidders that they will affirmatively ensure that in any contract entered into pursuant to this bid offering, minority business enterprises will be afforded full opportunity to participate in response to this offering and will not be discriminated against on the grounds of race, color, creed, sex, age, national origin, or sexual orientation in consideration for an award.

#### A.21 CONTRACT FORMS, TERM, EXTENSION

Any agreement, contract or purchase order resulting from the acceptance of a bid shall be on forms approved by the BCPA. **The term for any such agreement shall be for one (1) year, with a renewal option for a second (2<sup>nd</sup>) year at the discretion of the BCPA.** Bidder agrees that should the BCPA determine to extend the agreement for a second (2<sup>nd</sup>) year, its bid for goods and/or services shall be the same price per unit used to determine the first (1st) year's cost of goods and/or services, regardless of any reduction or increase in unit quantity by the BCPA.

#### A.22 LOCAL PREFERENCE

The BCPA provides a local preference. The BCPA reserves the right to award the contract to a local vendor if the price is within 10% of the lowest price submitted by any bidder.

## SECTION B: FORM OF BID

### B.01 MINIMUM QUALIFICATIONS

Bidder must have the capability/equipment/personnel which would enable them to transfer data through FTP transfer. Bidder must have back-up equipment available for printing, folding, stuffing, and mailing in case of equipment failure.

### B.02 ADMINISTRATIVE SUBMITTAL

- a. Bid Signature Form
- b. Drug-Free Workplace Certification (Attachment A ); Crimes Certification (Attachment B)

### B.03 INFORMATION TO BE SUBMITTED

- a. Description of firm's background and size, location of home office, and location of nearest local representative with whom the BCPA will communicate and coordinate administrative issues.
- b. An Executive Summary showing the bidder has the interest, knowledge, understanding of, and the means to provide the goods and/or services as outlined in the Request to Bid.
- c. List of clients for whom your firm has provided similar professional services within the last three (3) years. Such information should include: name, title, address, phone number of the organizations or individuals provided as references and the date (by month and year) when the services were provided.
- d. Identity of each person(s) within your firm who will be professionally associated with the BCPA on the day-to-day operations and oversight of this project. Describe their respective areas of expertise. Include Office, Cell, and after hour emergency contact information and phone numbers.
- e. Descriptions of the equipment your firm will use in completing this project.
- f. Description of your firm's ability to meet United States Postal Service requirements for addressing updates in order to qualify for automation discount postal rates.
- g. Indication of your unit pricing and extensions on the Bid Signature Form for the services requested.



### BIDDER INFORMATION QUESTIONNAIRE

Bidder Name: \_\_\_\_\_

If you are attaching additional sheets to answer the following questions, please include the number of the question with your answer.

1. How long has your company been in business?
2. Who is your designated Account Executive and how long has this person been with your company?
3. List all government agencies you have done business with, the contact person, and the telephone number.
4. What equipment would you use to produce/print the items being bid?
  - A. Number of Laser Printers: \_\_\_\_\_
  - B. Number of Flat Printing Presses \_\_\_\_\_
  - C. Number of Inserters \_\_\_\_\_
  - D. Number of Folders \_\_\_\_\_
5. What production capabilities does the equipment have?
  - A. Laser Printers \_\_\_\_\_
  - B. Flat Printing Presses \_\_\_\_\_
  - C. Inserters \_\_\_\_\_
  - D. Folders \_\_\_\_\_
6. What contingency plans are in effect if the production equipment is not functional?
7. Are all components for this project produced at your facility? If not, which components are subcontracted and with whom?
8. Where are your production facilities located?

## SECTION C: SCOPE and GENERAL SPECIFICATIONS

The BCPA is responsible for the preparation and mailing of 1) exemption/classification renewal cards and/or new applications to property owners previously qualified for various exemptions/classifications, 2) personal property returns to owners of commercial and residential tangible personal property within Broward County and 3) personal property notifications to all owners of commercial property assessed less than \$25,000 within Broward County. The bidder must possess the necessary resources: personnel, equipment, computer hardware and software, and expertise to produce renewal cards, exemption applications, personal property returns and personal property notifications from data supplied by the BCPA, along with accompanying inserts. The various mailings shall be CASS certified and sorted in order to receive the maximum postage discount. The NCOA move update method will be the Alternate Method. These mailings must be sent to the addresses provided to determine eligibility for exemptions, inserted with the appropriate inserts into envelopes provided by bidder and mailed in a timely manner as a completely turn-key project. **Bidder must provide proofs and receive BCPA approval prior to printing.**

The following specifications must be strictly adhered to in order for a bid to be considered. The projected mailing dates are listed separately for each mailing. The ability of the Bidder to meet these dates is an essential element of the criteria required in this Invitation to Bid. If Bidder fails to meet these deadlines due to no fault of the BCPA, Bidder will be prohibited from participating in any future BCPA mailings for a period of no less than two years. Samples from prior mailings for each job are attached for your review. The specifications and approximate quantities listed for each job should be used for calculating your proposals.

### **C 01. HOMESTEAD RENEWALS**

#### **a. Homestead Receipt**

Quantity: Approximately 411,000

Specs: C 7 PT High Bulk  
8 ½ x 11 2/S  
Black ink one side, Black & Red ink reverse side.

Property Appraiser will provide PDF no later than 12/7/09. Property Appraiser will provide vendor with text file containing parcel number, name, mailing address, property address, pin number and exemption type(s) no later than 12/18/09. Vendor is responsible for CASS certifying file and sorting file in order to receive maximum postage discount. Vendor is responsible for printing parcel number, the bar code associated with parcel number (3 of 9), name, mailing address, address bar code, pin number, property address, and exemption type(s) on one side of receipt and parcel number on the reverse side of the receipt. Address bar code may be printed on envelope in lieu of printing it on the receipt. Parcel number bar code must be compatible with WASP WPS 100 OMNI Directional Scanner. Parcel number

bar code and parcel number must appear in window of envelope. Vendor must supply Property Appraiser with 20 samples for parcel number bar code testing prior to printing receipts.

**b. Homestead Newsletter**

Quantity: Approximately 420,000

Specs: 11 x 17  
50# Offset  
Full Color – two-sided  
Fold to fit #10 envelope

Vendor will be provided newsletter in a PageMaker or PDF file format no later than 12/7/09.  
Vendor will deliver 9,000 newsletters to Property Appraiser no later than 1/4/10.

**c. Homestead Envelopes**

Quantity: Approximately 411,000

Specs: #10 Custom Window Envelope  
24# White, 4.125" x 9.5"

Window size and position: Window shall be a rectangle 1.5" x 4.5",  
positioned 15/16" from left side and .625" from bottom of envelope.

2/0 Black print and orange stripe (stripe will be placed on left side of  
envelope)

Property Appraiser will provide PDF no later than 11/12/09.

**d. Mailing Specs**

Vendor will fold and insert homestead receipt and homestead newsletter into #10 custom window envelope. Vendor will deliver homestead mailing to Fort Lauderdale (Oakland Park Blvd) post office in three equal drops on January 6<sup>th</sup>, 7<sup>th</sup> and 8<sup>th</sup>, 2010. Vendor is responsible for ensuring that Homestead Mailing meets all US Postal Guidelines. Vendor must submit proof of mailing (postal receipts) to BCPA within three days of mailing.

**e. Postage**

Bid shall be exclusive of postage costs.

**C 02. SENIOR HOMESTEAD RENEWALS**

**a. Senior Renewal Card:**

Quantity: Approximately 31,000

Specs: C 7 PT High Bulk  
4 x 9 2/S  
1/1 Black ink both sides

Property Appraiser will provide PDF no later than 1/22/10. Property Appraiser will provide vendor with text file containing parcel number, name and address no later than 1/22/10. Vendor is responsible for CASS certifying file and sorting file in order to receive maximum postage discount. Vendor is responsible for printing parcel number, bar code associated with parcel number (3 of 9), name, mailing address, address bar code, property address and legal description on one side of receipt. Parcel number bar code must be compatible with WASP WPS 100 OMNI Directional Scanner. Vendor to supply Property Appraiser with 20 samples for bar code testing prior to printing renewal cards.

**b. Senior Homestead Renewal #10 Standard Window Envelope**

Quantity: Approximately 31,000

Specs: 24# White, 4.125" x 9.5"  
2/0 Black print and fuchsia stripe (stripe will be placed on left side of envelope)

Property Appraiser will provide PDF no later than 11/12/09.

**c. Senior Renewal Letter**

Quantity: Approximately 31,000

Specs: 20# Bond White  
8 ½ x 11  
1/0 Black ink one side

Property Appraiser will provide PDF no later than 1/22/10. Vendor is responsible for printing and folding letter to fit #10 envelope.

**d. #9 Standard Envelope**

Quantity: Approximately 41,000

Specs: #9 Business Reply Envelope  
24# White  
2/0 Black print and fuchsia stripe (stripe will be placed on left side of envelope)

Property Appraiser will provide PDF no later than 11/12/09.

**e. Mailing Specs**

Vendor will deliver 10,000 #9 senior envelopes to Property Appraiser no later than 1/4/10. Vendor must insert Senior Renewal Card, letter and #9 envelope into #10 window envelope. Vendor will deliver senior renewal mailing to post office no later than 1/29/10. Vendor is responsible for ensuring that Mailing meets all US Postal Guidelines. Vendor must submit proof of mailing (postal receipts) to BCPA within three days of mailing.

**f. Postage**

Bid shall be exclusive of postage costs.

**C 03. NEW SENIOR MAILING**

**a. Sworn Statement**

Quantity: Approximately 2,500

Specs: 20# Bond White  
8 1/2 x 11  
1/1 Black ink two sides

Property Appraiser will provide PDF no later than 1/22/10. Property Appraiser will provide vendor with data file containing parcel number, name and address no later than 1/22/10. Vendor must include this information as well as the bar code associated with the parcel number on the sworn statement.

**b. #10 Window Envelope**

Quantity: Approximately 2,500

Specs: 24# White, 4.125" x 9.50"  
2/0 Black print and fuchsia stripe (stripe will be placed on left side of envelope)

Property Appraiser will provide PDF no later than 11/12/09.

**c. #9 Envelope**

Quantity: Approximately 2,500

Specs: #9 Business Reply Envelope  
24# White  
2/0 Black print and fuchsia stripe (stripe will be placed on left side of envelope)

Property Appraiser will provide PDF no later than 11/12/09.

**d. New Senior Letter**

Quantity: Approximately 2,500

Specs: 20# Bond White  
8 ½ x 11  
1/0 Black ink one side

Property Appraiser will provide PDF no later than 1/22/10. Vendor is responsible for folding letter to fit #10 envelope.

**e. IRS Form 4506-T**

Quantity: Approximately 2,500

Specs: 20# Bond White  
8 ½ x 11  
1/1 Black ink both sides

Property Appraiser will provide PDF no later than 12/7/09. Vendor is responsible for folding Form 4506-T to fit #10 envelope.

**f. Mailing**

Vendor must insert Sworn Statement, new senior letter, Form 4506-T and #9 envelope into #10 window envelope. Vendor will deliver new senior mailing to post office no later than 1/29/10. Vendor is responsible for ensuring that Mailing meets all US Postal Guidelines. Vendor must submit proof of mailing (postal receipts) to BCPA within three days of mailing.

**g. Postage**

Bid shall be exclusive of postage costs.

**C 04. PERSONAL PROPERTY**

**a. Personal Property Brochure**

Quantity: Approximately 30,000

Specs: T 60# Offset White  
8 ½ x 14  
Fold to #10 envelope  
2/2 Two colors both sides – blue and black ink

Property Appraiser will provide PDF no later than 12/7/09. Vendor is to deliver 5,000 Personal Property brochures to Property Appraiser no later than 1/4/10.

**b. Personal Property Envelopes**

**1. #10 Custom Double Window**

Quantity: 25,000  
Specs: 24# White, 4.125" x 9.5"

Bottom window size and position: Window shall be a rectangle, 1.125" x 4.50", positioned 0.9375" from the left side and 0.5 from the bottom of the envelope.

Top window size and position: Window shall be a rectangle 1.125" x 4.50", positioned 0.9375" from the left side and 2.50" from the bottom of the envelope.

2/0 Two colors – black print and blue stripe  
(stripe will be placed on left side of envelope)

**2. # 9 plain envelope**

a) Quantity: 25,000

Specs: 24# white, 3.875" x 8.875"

2/0 Two colors – black print and blue stripe (stripe will be placed on left side of envelope)

**c. DR-405 (Personal Property Returns)**

Quantity: 25,000

Specs: T 20# Bond White  
8 ½ x 11  
1/1 Black ink

Property Appraiser will provide vendor with DR-405 in a PDF no later than 12/7/09. Property Appraiser will provide vendor with data file containing data to be included on returns no later than 12/18/09. Vendor is responsible for CASS certifying file and sorting file in order to receive maximum postage discount. Vendor is responsible for printing account number, bar code associated with the account number, name, address, address bar code, value information and return address on DR-405. Account number and bar code associated with account number must appear in window of envelope. Vendor may print address bar code on envelope in lieu of printing it on form. Returns are to be folded to fit #10 custom double window envelopes.

**d. DR-405I (Personal Property Instructions)**

Quantity: 25,000

Specs: T 20# Bond White  
8 ½ x 11  
1/1 Black ink both sides

Property Appraiser will provide vendor with PDF no later than 12/7/09. Personal Property instruction sheets are to be folded to fit #10 window envelopes. Vendor will insert personal property brochure, instruction sheet and Personal Property return and appropriate #9 envelope into appropriate #10 custom double window envelope. Vendor is responsible for ensuring that mailing meets all US Postal Guidelines. Vendor will deliver personal property mailing to post office no later than 1/11/10. Vendor must submit proof of mailing (postal receipts) to BCPA within three days of mailing.

**e. Postage**

Bid shall be exclusive of postage costs.



**C 05. Non-Profit Renewal**

**a. Renewal Card (DR-498)**

Quantity: 3,000

Specs: The Renewal Application consists of two attached (double) post cards. Card paper shall be 110# Yellow Index.  
Forms will be 8" in overall length and 6" in overall width.  
Black and red ink on front side and black ink only on back.  
All forms to be horizontally perforated every 4" allowing for separation of each form set and at fold.

Property Appraiser will provide vendor with DR-498 in a PDF no later than 12/7/09. Property Appraiser will provide vendor with data file containing data to be included on returns no later than 12/18/09. Vendor is responsible for CASS certifying file and sorting file in order to receive maximum postage discount. Vendor is responsible for printing parcel number, the bar code associated with parcel number, name, mailing address, address bar code, legal description, and exemption type on one side of card. Parcel number bar code must be compatible with WASP WPS 100 OMNI Directional Scanner. Vendor must supply Property Appraiser with 20 samples for bar code testing prior to printing receipts. Vendor is responsible for folding and tabbing perforated cards and delivering them to Post Office no later than 1/11/10. Vendor is responsible for ensuring that Mailing meets all US Postal Guidelines. Vendor must submit proof of mailing (postal receipts) to BCPA within three days of mailing.

**b. Postage**

Bid shall be exclusive of postage costs.

**C 06. Agricultural Renewal**

**a. Renewal Card (DR-499)**

Quantity: 1,400

Specs: The Renewal Application consists of two attached (double) post cards. Card paper shall be 110 Green Index.  
Forms will be 8" in overall length and 6" in overall width.  
Black and red ink on front side and black ink only on back.  
All forms to be horizontally perforated every 4" allowing for separation of each form set and at fold.

Property Appraiser will provide vendor with DR-499 in a PDF no later than 12/7/09.

Property Appraiser will provide vendor with data file containing data to be included on returns no later than 12/18/09. Vendor is responsible for CASS certifying file and sorting file in order to receive maximum postage discount. Vendor is responsible for printing parcel number, the bar code associated with parcel number, name, mailing address, address bar code, legal description, and exemption type on one side of card. Parcel number bar code must be compatible with WASP WPS 100 OMNI Directional Scanner. Vendor must supply Property Appraiser with 20 samples for bar code testing prior to printing renewal cards. Vendor is responsible for folding and tabbing perforated cards and delivering them to Post Office no later than 1/11/10. Vendor is responsible for ensuring that Mailing meets all US Postal Guidelines. Vendor must submit proof of mailing (postal receipts) to BCPA within three days of mailing.

**b. Postage**

Bid shall be exclusive of postage costs.

**C 07. TPP Postcard**

**a. TPP Postcard**

Quantity: Approximately 70,000

Specs: Card paper shall be 110 White Index.  
Forms will be 4" in overall length and 6" in overall width.  
Black ink on two sides.

Property Appraiser will provide vendor with PDF no later than 12/7/09. Property Appraiser will provide vendor with data file containing data to be included on postcards no later than 12/18/09. Vendor is responsible for CASS certifying file and sorting file and applying NCOA move update in order to receive maximum postage discount. Vendor is responsible for printing account number, name and mailing address on one side of card. Vendor is responsible for delivering them to Post Office no later than 1/18/10. Vendor is responsible for ensuring that Mailing meets all US Postal Guidelines. Vendor must submit proof of mailing (postal receipts) to BCPA within three days of mailing.

**b. Postage**

Bid shall be exclusive of postage costs.

SECTION D: BID SIGNATURE FORM

\_\_\_\_\_  
Firm Name

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

\_\_\_\_\_  
Telephone Number

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

**D 01. HOMESTEAD RENEWAL**

	Unit Price	Extended Price
Printing 411,000 Homestead Receipts	_____	_____
Printing 420,000 Newsletters	_____	_____
Printing 411,000 #10 Window Envelopes	_____	_____
Folding, Inserting & Mailing 411,000 Homestead Receipts and Newsletters	_____	_____
Folding 9,000 Newsletters	_____	_____
TOTAL		_____

**D 02. SENIOR HOMESTEAD RENEWALS**

	Unit Price	Extended Price
Printing 31,000 Senior Renewal Cards	_____	_____
Printing 31,000 Senior Renewal Letters	_____	_____
Printing 31,000 #10 Window Envelopes	_____	_____
Printing 41,000 #9 Business Reply Envelopes	_____	_____

Inserting & Mailing 31,000 Senior Renewal Cards, #9 BRE and Letters	_____	_____
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**TOTAL**

**D 03. NEW SENIOR MAILING**

	Unit Price	Extended Price
Printing 2,500 Senior Sworn Statements	_____	_____
Printing 2,500 New Senior Letters	_____	_____
Printing 2,500 #10 Window Envelopes	_____	_____
Printing 2,500 #9 Business Reply Envelopes	_____	_____
Printing 2,500 IRS Form 4506-T	_____	_____
Folding, Inserting & Mailing 2,500 Senior Sworn Statements, IRS Form 4506-T, #9 BRE, and Letter	_____	_____

**TOTAL**

**D 04. PERSONAL PROPERTY MAILING**

	Unit Price	Extended Price
Printing 30,000 Personal Property Brochures	_____	_____
Printing 25,000 TPP #10 Double Window Envelope	_____	_____
Printing 25,000 TPP #9 Business Reply Envelopes	_____	_____
Printing 25,000 Personal Property Returns (DR-405)	_____	_____

Printing 25,000 Personal Property Instructions (DR-405I)	_____	_____
Folding, Inserting & Mailing 25,000 Returns, Instruction Sheets, #9 BRE and Brochures	_____	_____
Folding 5,000 Brochures	_____	_____
<b>TOTAL</b>		_____

**D 05. Non-Profit Renewal Mailing**

	Unit Price	Extended Price
Printing 3,000 Renewal Cards (DR-498)	_____	_____
Folding, Tabbing & Mailing 3,000 Renewal Cards	_____	_____
<b>TOTAL</b>		_____

**D 06. Agricultural Renewal Mailing**

	Unit Price	Extended Price
Printing 1,400 Renewal Cards (DR-499)	_____	_____
Folding, Tabbing & Mailing 1,400 Renewal Cards	_____	_____
<b>TOTAL</b>		_____

**D 07. TPP Postcard Mailing**

	Unit Price	Extended Price
Printing 70,000 Postcards	_____	_____
Mailing 70,000 Postcards	_____	_____
<b>TOTAL</b>		_____

The undersigned attests to his/her authority to submit this bid and to bind the firm herein named to perform as per the agreement. If the firm is selected by the BCPA, the undersigned certifies that he/she will negotiate in good faith to establish an agreement to produce the mailings according to the requirements of this RFP 2010-BF-1.

*Should the BCPA determine to extend any agreement resulting from the acceptance of this proposal for a second (2<sup>nd</sup>) year (as set forth in A.21), we hereby agree that the price per unit quoted above shall be the same price per unit to be used to determine costs of the goods and/or services for the second (2<sup>nd</sup>) year, regardless of an increase or decrease in quantity by the BCPA.*

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Witness Signature

Date \_\_\_\_\_

Date \_\_\_\_\_

\_\_\_\_\_  
Printed Name and Title of Above Signer

\_\_\_\_\_  
Printed Name and Title of Above Signer

**ATTACHMENT A**

**DRUG FREE WORKPLACE CERTIFICATION**

SWORN STATEMENT PURSUANT TO BROWARD COUNTY BCPA POLICY ON DRUG FREE WORKPLACE

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

This sworn statement is submitted to the Broward County Property Appraiser

by: \_\_\_\_\_  
[print individual's name and title]

for: \_\_\_\_\_  
[print name of entity submitting sworn statement]

whose business address is: \_\_\_\_\_

And its Federal Employer Identification Number or Social Security Number (if applicable) of the individual signing this sworn statement is \_\_\_\_\_

I understand that no person or entity shall be awarded or receive a BCPA contract for public improvements, procurement of goods or services (including professional services) or a BCPA lease unless such person or entity has submitted a written certification to the BCPA that it will provide a drug free work place by:

- (1) providing a written statement to each employee notifying such employee that the unlawful manufacture, distribution, dispensation, possession or use of a controlled substance as defined by Section 893.02(4), Florida Statutes, as the same may be amended from time to time, in the person's or entity's workplace is prohibited specifying the actions that will be taken against employees for violation of such prohibition. Such written statement shall inform employees about:
  - (i) the dangers of drug abuse in the work place;
  - (ii) the person's or entity's policy of maintaining a drug free environment at all its workplaces, including but not limited to all locations where employees perform any tasks relating to any portion of such contract or business transaction;
  - (iii) any available drug counseling, rehabilitation, and employee assistance programs; and
  - (vi) the penalties that may be imposed upon employees for drug abuse violations.
- (2) Requiring the employee to sign a copy of such written statement to acknowledge his or her receipt of same and advice as to the specifics of such policy. Such person or entity shall retain the statements signed by its employees. Such person or entity shall also post

in a prominent place at all of its work places a written statement of its policy containing the foregoing elements (i) through (iv).

- (3) Notifying the employee in the statement required by subsection (1) that as a condition of employment the employee will:
  - (i) abide by the terms of the statement; and
  - (ii) notify the employer of any criminal drug statute conviction for a violation occurring in the work place no later than five (5) days after such a conviction.
- (4) Notifying the BCPA within ten (10) days after receiving notice under subsection (3) from an employee or otherwise receiving actual notice of such conviction.
- (5) Imposing appropriate personnel action against such employee up to and including termination; or requiring such employee to satisfactorily participate in a drug abuse assistance or rehabilitation program approved for such purposes by a federal, state, or local health, law enforcement, or other appropriate agency.
- (6) Making good faith effort to continue to maintain a drug free work place through implementation of sections (1) through (5) stated above.

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE BCPA IS VALID THROUGH FOR ONE (1) CALENDAR YEAR FROM THE DATE WHICH IT IS FILED. I ALSO UNDERSTAND THAT ANY CONTRACT OR BUSINESS TRANSACTION SHALL PROVIDE FOR SUSPENSION OF PAYMENTS, OR TERMINATION, OR BOTH IF THE BCPA DETERMINES THAT:

- (1) such person or entity has made false certification;
- (2) such person or entity violates such certification by failing to carry out the requirements of sections (1) thru (6) above; or
- (3) such a number of employees of such person or entity have been convicted of violations occurring in the work place as to indicate that such person or entity has failed to make a good faith effort to provide a drug free work place.



**DRUG FREE WORKPLACE CERTIFICATION**

\_\_\_\_\_  
[Signature]

State of: \_\_\_\_\_

County of: \_\_\_\_\_

Sworn to and subscribed before me this \_\_\_\_\_ day of \_\_\_\_\_, 2009,

by \_\_\_\_\_ who is personally known to me or has

produced the following identification:

\_\_\_\_\_  
[Type of Identification]

\_\_\_\_\_  
Notary Public - State of Florida

My Commission Expires \_\_\_\_\_

\_\_\_\_\_  
[Printed, typed or stamped commissioned name of Notary  
Public]

**ATTACHMENT B**

**PUBLIC CONTRACTING AND ENVIRONMENTAL CRIMES CERTIFICATION**

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

This sworn statement is submitted to the Broward County Property Appraiser by \_\_\_\_\_  
[print name and  
\_\_\_\_\_ for \_\_\_\_\_  
title of individual] [print name of entity submitting sworn statement]

whose business address is: \_\_\_\_\_ and (if  
applicable) its Federal Employer Identification Number (FEIN) is \_\_\_\_\_.  
[Soc Sec # if no FEIN]

I understand that no person or entity shall be awarded or receive a county contract for public improvements, procurement of goods or services (including professional services) or a county lease, franchise, concession or management agreement, or shall receive a grant of county monies unless such person or entity has submitted a written certification to the Broward County Property Appraiser that it has not:

(1) been convicted of bribery or attempting to bribe a public officer or employee of Broward County, the State of Florida, or any other public entity, including, but not limited to the Government of the United States, any state, or any local government authority in the United States, in that officer's or employee's official capacity; or

(2) been convicted of an agreement or collusion among bidders or prospective bidders in restraint of freedom of competition by agreement to bid a fixed price, or otherwise; or

(3) been convicted of a violation of an environmental law that, in the sole opinion of the BCPA, reflects negatively upon the ability of the person or entity to conduct business in a responsible manner; or

(4) made an admission of guilt of such conduct in items (1), (2), or (3) above, which is a matter of record, but has not been prosecuted for such conduct, or has made an admission of guilt of such conduct, which is a matter of record, pursuant to formal prosecution. An admission of guilt shall be construed to include a plea of nolo contendere; or

(5) where an officer, official, agent or employee of a business entity has been convicted of or has admitted guilt to any of the crimes set forth above on behalf of such an entity and pursuant to the direction or authorization of an official thereof (including the person committing the offense, if he is an official of the business entity), the business shall be chargeable with the conduct herein above set forth. A business entity shall be chargeable with the conduct of an affiliated entity, whether wholly owned, partially owned, or one which has common ownership or a common board of directors. For purposes of the form, business entities are affiliated if, directly or indirectly, one business entity controls or has power to control another business

entity, or if an individual or group of individuals controls or has the power to control both entities. Indicia of control shall include, without limitation, interlocking management or ownership, identity of interests among family members, shared organization of a business entity following ineligibility of a business entity under this Article, or using substantially the same management, ownership or principles as the ineligible entity.

Any person or entity who claims that this Article is inapplicable to him/her/it because a conviction or judgment has been reversed by a court of competent jurisdiction shall prove the same with documentation satisfactory to the BCPA's Director of Finance, Budget and Tax Roll Management. Upon presentation of such satisfactory proof, the person or entity shall be allowed to contract with the BCPA.

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE BCPA IS VALID FOR ONE (1) CALENDAR YEAR FROM THE DATE WHICH IT IS FILED. I ALSO UNDERSTAND THAT ANY CONTRACT OR BUSINESS TRANSACTION SHALL PROVIDE FOR SUSPENSION OF PAYMENTS, OR TERMINATION, OR BOTH, IF THE BCPA DETERMINES THAT SUCH PERSON OR ENTITY HAS MADE FALSE CERTIFICATION.

\_\_\_\_\_  
Signature

STATE OF FLORIDA

COUNTY OF \_\_\_\_\_

Sworn to and subscribed before me this \_\_\_\_\_ day of \_\_\_\_\_, 2009,

by \_\_\_\_\_ .Personally known \_\_\_\_\_ or

produced identification \_\_\_\_\_

[Type of identification]

\_\_\_\_\_  
Notary Public Signature      My commission expires \_\_\_\_\_

\_\_\_\_\_  
[Print, type or stamp Commissioned name of Notary Public]

**SIGNATORY REQUIREMENT** - In the case of a business entity other than a partnership or a corporation, this affidavit shall be executed by an authorized agent of the entity. In the case of a partnership, this affidavit shall be executed by the general partner(s). In the case of a corporation, this affidavit shall be executed by the corporate president.

## **ATTACHMENT C**

### **SAMPLES**

The following pages are samples from the 2009 BCPA exemption/classification and personal property mailings. The BCPA will provide updated pdf files for each item for the 2010 mailings.

# 2009 HOMESTEAD EXEMPTION RENEWAL RECEIPT

Dear Homesteaded Neighbor:

Homestead Receipt - Front Page

Our annual Homestead renewal notice gives property owners the key information they need to know.

First: We **ONLY** printed below the name(s) of the property owner(s) who are protected by a homestead exemption at this property. **IF YOUR NAME IS NOT PRINTED ON THIS CARD, IT MEANS YOU ARE NOT PROTECTED BY HOMESTEAD AT THIS PROPERTY.** If you are a co-owner residing on the property and are not listed below, you should **IMMEDIATELY** visit our website at [www.bcpa.net](http://www.bcpa.net) to file online for homestead. If you believe our information is incorrect or if you have any questions, please contact us by phone at **954.357.6830**, by e-mail at [cguske@bcpa.net](mailto:cguske@bcpa.net), or visit one of our offices.

Second: The Homestead Exemption of anyone named below will be **AUTOMATICALLY RENEWED** for 2009, provided there was no change in the ownership or use of the property. **By law, you MUST notify us if the property has been rented out, a homesteaded owner died or moved away, if you are claiming a homestead or residency-based exemption on any other property, etc.** Please use the below response card to notify us of applicable changes.

Third: If you recently moved into this property, your Homestead Exemption does **NOT** transfer to your new home and you must apply for a new Homestead Exemption. If you received this card at your home address, but the name printed below is the former owner(s), you must apply for a new Homestead Exemption in your own name to receive these tax savings.

Fourth: The renewal application for the Senior's Additional Exemption will be mailed in **early February**. Please contact us at 954.357.6830 if you had this exemption in 2008 but do not receive a renewal notice by February 15, 2009.

Finally -- as explained in detail on the back page of the enclosed newsletter -- our office is conducting a Residential Property Survey to update our records. I strongly encourage you to participate, using the web address and PIN number printed below.

Sincerely,



Lori Parrish, CFA  
Broward County Property Appraiser  
[lori@bcpa.net](mailto:lori@bcpa.net)

RESIDENTIAL SURVEY ([www.bcpa.net/survey](http://www.bcpa.net/survey))  
PIN NUMBER: 91649

PROPERTY ADDRESS:  
1100 SW 14 TER

PARCEL I.D. #:  
504209-29-0040

PLEASE CUT ALONG DOTTED LINE AND MAIL IN AN ENVELOPE TO OUR OFFICE



IF YOU ARE COMPLETING A CHANGE ORDER, PLEASE RETURN TO US AT...

Your Exemptions:  
HOMESTEAD 2ND HOMESTD

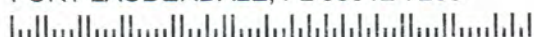
\*\*\*\*\*AUTO\*\*5-DIGIT 33312 T909 P1 249996

Parcel ID# 504209-29-0040



Homesteaded Owner(s):

LYMAN, NORTON C TR  
1100 SW 14TH TER  
FORT LAUDERDALE, FL 33312-7259



## MAIL TO:

Lori Parrish, CFA  
Broward County Property Appraiser  
Attn: Customer Service  
115 South Andrews Avenue, Room 111  
Fort Lauderdale, FL 33301-1801

or FAX TO: 954.357.8474

or E-MAIL TO: [kcardone@bcpa.net](mailto:kcardone@bcpa.net)



**ASSESSMENTS: WHY DON'T THEY REFLECT TODAY'S VALUES?** This is the most common question we are asked. Per Florida law, assessments are done a year in arrears with January 1 as the statutory date for determining the assessed value. Your 2009 assessment will be based on the sales in your neighborhood (generally including short-sales and foreclosures, and adjusted downwards to deduct for typical costs of sale) between January 2, 2008 and January 1, 2009. Any change in value after January 1, 2009, will be reflected in your 2010 assessment. The Florida Legislature intended this to protect owners during years of rising values -- which are more common in Florida than down years -- by delaying value increases. However, it unfortunately has the opposite effect in years of declining values as we are currently experiencing.



**SPECIAL SATURDAY HOURS:** To better serve Broward working families, our offices will be open from 8:30 am to 5:00 pm on six Saturdays in 2009: January 24, February 28, May 2, August 22, August 29 and September 12.

**PORTABILITY: MOVING YOUR HOMESTEAD SAVINGS TO YOUR NEW HOMESTEAD:** Under Florida law, you may transfer your Save Our Homes assessment benefit -- up to \$500,000 maximum -- from a previous Florida homestead to a new homestead. To be eligible: you must have had a 2007 or later Homestead Exemption on the previous property; there must be "total abandonment" of the homestead on the previous property by all owners; and you must receive a new Homestead Exemption within two tax-years after you abandon the previous homestead. You are not required to sell the previous homestead. Please visit our [www.bcpa.net](http://www.bcpa.net) website or contact us at 954.357.6830 for more information.



**RESIDENTIAL PROPERTY SURVEY:** Please take two minutes to ensure our records about your property are accurate. Please visit [www.bcpa.net/survey](http://www.bcpa.net/survey) and -- using the PIN number on the reverse side -- answer a few simple questions (number of bedrooms, bathrooms, etc.). Use the back cover of our newsletter if you'd prefer to respond by mail or fax. Also, be sure to look up your property on our website, as we've added building sketches to those pages. Just click on the blue "See Sketch" link on the lower right-hand side of the property record page -- and please call 954.357.6831 if you see any errors in the sketch of your home. *Note: we do not currently have sketches of condo units.*

**MAILING ADDRESS CHANGES:** If your mailing address is incorrect or if the name of an owner is misspelled, please promptly notify our Data Entry Section at 954.357.6841 or [jcavrudatz@bcpa.net](mailto:jcavrudatz@bcpa.net) so we can keep our records up to date. Be sure to let us know if your mailing address changes in the future.

PLEASE CUT ALONG DOTTED LINE AND MAIL IN AN ENVELOPE TO OUR OFFICE

## OFFICIAL RECORDS CHANGE ORDER - 2009

PARCEL # 504209-29-0040

**IMPORTANT:** Pursuant to Sec. 196.011(9)(a), Fla. Stat., **you are required to report changes** in ownership or use of a Homesteaded property, or your eligibility for exemptions. Failure to do so may subject you to up to 10 years of back taxes, plus a 50% penalty and 15% interest per year.

- ☐ I no longer lived at the subject property as of January 1, 2009. Date moved: \_\_\_\_\_
- ☐ This property was rented out as of January 1, 2009. Date first rented out: \_\_\_\_\_
- ☐ I no longer qualify for the widow/widower exemption or disabled veteran's surviving spouse exemption, as I remarried. Date remarried: \_\_\_\_\_
- ☐ I now qualify for the widow's/widower's exemption (Please enclose copy of death certificate or obituary).
- ☐ I no longer qualify for the disability exemption.
- ☐ Owner deceased. Name of Deceased Owner: \_\_\_\_\_ Owner's date of death: \_\_\_\_\_
- ☐ I demolished the subject property residence with the intent to rebuild a new permanent residence on the subject property. Date of demolition: \_\_\_\_\_
- ☐ Owner is currently residing in an Assisted Living Facility as of \_\_\_\_\_ (Year) and ☐ INTENDS / ☐ DOES NOT INTEND to return to the property.
- ☐ I am not eligible to receive Homestead on this property because I and/or my married spouse are claiming the benefits of a permanent residency based property tax exemption or tax credit on another property elsewhere in the world (Examples: Homestead Exemption, NY STAR, Veteran's Exemption, Senior/Disability Exemption, etc.).

If you checked any of the above boxes, please sign below and return this card to us by March 2, 2009. **If you did not check any boxes above, DO NOT RETURN THIS CARD as your Homestead will be automatically renewed without further action.** Thank you.

Date: \_\_\_\_\_ Signature: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_





# News for Broward Taxpayers

Winter - Spring 2009

Visit us online at [WWW.BCPA.NET](http://WWW.BCPA.NET) or call 954.357.6830

## RESIDENTIAL PROPERTY SURVEY

The Broward County Property Appraiser's Office is continuing to upgrade our computer mass-appraisal system to better serve the taxpayers. We are seeking your assistance in improving and updating our property records. We are transitioning from a rather antiquated system which never tracked physical details of properties such as the number of bedrooms and bathrooms, carports, etc. While completing the property survey below is purely voluntary, any assistance you provide will help ensure you pay no more than your fair share of taxes.

If you received this newsletter in the mail with your Homestead Renewal Notice, you also have the option of completing this quick survey online at [www.bcpa.net/survey](http://www.bcpa.net/survey) using the PIN number printed on your renewal receipt. If you do not have a PIN number, you must use this printed form to participate. **IMPORTANT:** If you previously completed this survey, you do not need to resubmit it this year.

Thank you, in advance, for your help.

  
Lori Parrish, CFA  
Broward County Property Appraiser  
[lori@bcpa.net](mailto:lori@bcpa.net)

NAME: \_\_\_\_\_ PARCEL ID (if known): \_\_\_\_\_

PROPERTY ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ Number of Buildings: \_\_\_\_\_ Number of Bedrooms: \_\_\_\_\_

Number of Bathrooms: \_\_\_\_\_ Family Room: Y N Fireplace: Y N Florida Room/Den: Y N

Carport: Y N If Yes, number of car spaces: \_\_\_\_\_ Garage: Y N If Yes, number of car spaces: \_\_\_\_\_

Central A/C: Y N In-Ground Pool: Y N If Yes, is the pool screened: Y N In-Ground Jacuzzi: Y N

Porch: Y N If Yes, is it screened: Y N Driveway Type: Asphalt Concrete Brick Pavers Gravel None

Please fax this page to 954.357.8474 or mail it to:

**Property Appraiser's Office**  
**Attn: Residential Division**  
**115 S. Andrews Avenue, Room 111**  
**Fort Lauderdale, FL 33301**

Questions about this survey? Please call our Residential Division at 954.357.6831 or email [jchesler@bcpa.net](mailto:jchesler@bcpa.net)

**Our Main Office: 115 South Andrews Avenue, Room 111, Fort Lauderdale, Florida 33301**  
**Our Branch Office: 1 N. University Drive, Suite 111-A, Plantation, Florida 33324 - 954.370.3700**



# News for Broward Taxpayers

Winter - Spring 2009

>>> Guide to Additional Exemptions: See Inside <<<

## New on WWW.BCPA.NET

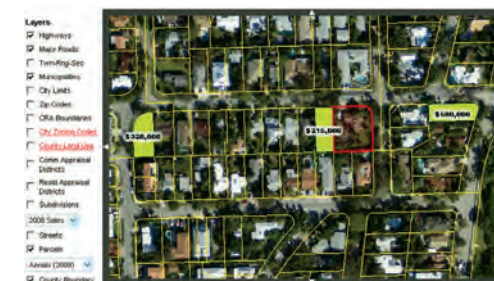
► **PICTOMETRY** - View four-directional, 45-degree, low elevation images of every property in Broward County. In addition to the traditional overhead "straight-down" aerial photography on our website, this new tool allows you to get a better look at Broward County. To find these images, first look up a property. Next, on the property record page, click the VIEW MAP button at the top. Then, click on the selection tool (white arrow) and click on the property you want to view. You will see property details listed on the right side and, just above it, click the red **Pictometry** link. Use the four side bars around the photo to slide the image. The 2007 and 2008 images are available on our website.



► **SEARCH NEIGHBORHOOD SALES** - We have two convenient ways you can view all sales since January 2007 in any subdivision or condo. To view a list of all sales, simply

Folio Number	Date	Type	Book/Page	Q/D	Amount
504202100400	1/3/2007	WD	43381/1515	Q	\$940,000
504202100293	1/8/2007	WD	43412/1365	Q	\$620,000
504202100360	1/18/2007	JOT	43515/305	T	
504202100660	5/4/2007	QCD	44056/403	T	\$100
504202100672	5/23/2007	QCD	44189/573	D	\$540,000
504202100830	8/20/2007	WD	44636/1200	Q	\$326,000

look up a property and scroll down to the Sales History section on the page. Click the blue **Search Subdivision Sales** link to display all the sales. Another option -- if you'd like a visual approach -- is to use our VIEW MAP feature on the property record pages. Once you reach the aerial for your chosen property, simply change the drop-box reading "No Sales" to "2008 Sales" and all 2008 sales will light up on the map. 2007 sales are also available with this map feature.



## Facts About Property Taxes

Despite common belief, the Property Appraiser does **NOT** set your taxes. Per the Florida Constitution and Florida Statutes, the Property Appraiser is responsible for listing, inspecting, and fairly assessing the just value of all real property and tangible business property as of January 1 of each year. Additionally, the Property Appraiser administers the valuable tax-saving exemptions and safeguards them from abuse by tax cheats.

Who sets your taxes? The County Commission, School Board, City Commission, and independent taxing authorities (hospital district, etc.) each set portions of your property tax millage rates. They also set any non-ad valorem fees on your tax bill. The Florida Legislature sets a sizable portion of your school taxes, based upon a statewide formula. The school budget -- at roughly 37% of the entire property tax bill -- makes up the single largest portion of your tax bill.

Additionally, the Property Appraiser does not collect the taxes. This task is performed by the Broward County Revenue Collection Division -- which is entirely independent of our office. You may contact Revenue directly with tax payment questions at [revenue@broward.org](mailto:revenue@broward.org) or 954.831.4000.

## Bringing Customer Service to Our Customers

We are enhancing our community efforts in every corner of Broward by adding new outreach events at condos, city halls, businesses, and other locations. See our online calendar for the upcoming events. If you'd like to have someone from our office attend an upcoming meeting of your condo, homeowner or civic association, please contact Outreach Coordinator Kelly Brown at [kbrown@bcpa.net](mailto:kbrown@bcpa.net) or 954.357.6035.



Check out our helpful **Portability Estimator** on our [WWW.BCPA.NET](http://WWW.BCPA.NET) website. You'll find it at the top of the property record page for the home or condo you're looking to purchase.



## &gt;&gt;&gt; Guide to Homestead and Other Tax-Saving Exemptions &lt;&lt;&lt;

## A Homestead Exemption and “Save Our Homes” Could Save You Over \$800 Each Year in Property Taxes

**REAL TAX SAVINGS:** An eligible Broward County property owner in 2008 saved approximately \$800 in taxes due to the Homestead Exemption. Additionally - once the real estate market rebounds - all Homesteaded properties will benefit from the “Save Our Homes” 3% tax assessment cap that automatically comes with the Homestead Exemption (starting in the year after you first obtain homestead). The SOH cap limits assessment increases during years of rising market values.

**THE BASICS:** All Florida permanent residents are potentially eligible under state law for a Homestead Exemption on their homes, condominiums, co-op units, and certain mobile home lots. Every person who has legal or equitable title to a residential property and who lives there permanently may be eligible for Homestead. **To be eligible, you:**



- Must **permanently reside** on the property as of **January 1** of the year for which you are applying;
- Must be a US citizen, permanent resident alien, or hold “PRUCOL” asylum/refugee status;
- Cannot have a Homestead or other residency-based exemption or tax credit in **any** other county, state or country. Florida Statutes allow only one homestead per “family unit.” This means you are not legally entitled to claim the exemption in Broward if you or your married spouse is currently receiving a residency-based exemption on property anywhere else in the world.
- Cannot rent out the home (unless you are active duty US military).

The property may also qualify for Homestead if it is the permanent home of a person who is **legally dependent** on the owner, even if the owner is not eligible. A **Life Estate** holder is eligible for homestead if he/she meets the eligibility requirements. Likewise, if the real estate is held in a **Trust**, you will need to provide us with a notarized Certificate of Trust form (available on our website) showing you have the necessary ownership interest for Homestead.

**FILING PROCESS:** You may file for Homestead either online at [www.bcpa.net](http://www.bcpa.net), in person at our offices, or at any of our outreach events. To file, you must have the following documents showing you reside at the property:

- **Broward Voter’s Card** or recorded **Declaration of Domicile** (form available at our office or on our website).
- **Florida Driver’s License** (or -- for non-drivers only -- an official **Florida I.D. Card**). A “Valid In Florida Only” license does **NOT** qualify.
- **For Non-US Citizens:** **Permanent Resident Card**, proof of **asylum/refugee status**, or other documentation from Immigration showing your **intent to be a permanent resident** of the United States. *Note: Holders of work, student, investor and other temporary US visas are not eligible for Homestead under state law.*

**FILING PERIOD:** There is no filing fee if you pre-file before the start of the next tax year or file for 2009 exemption by the March 2, 2009, deadline. You may **LATE FILE** between March 3 and September 18, 2009, for any exemption -- although the Value Adjustment Board will charge you a \$15 fee and require an additional late filing form.

**HOMESTEADS DO NOT TRANSFER:** A Homestead Exemption does **NOT** move with an owner from place to place -- but you may move your valuable Save Our Homes savings under Florida’s **Portability** Amendment. When moving to a new home, you **MUST** file for a new Homestead Exemption and (if eligible) also file a separate Portability application. You may file for Homestead and obtain the Portability form on our website. Under Florida law, an owner has less than two years to establish a new Homestead or the Portability savings will be lost. Contact us if you have questions about Portability.

**RENEWALS:** Once your Homestead Exemption is established, it **automatically renews** each year unless there is a change of ownership or use of the property. Florida law requires the property owner to inform our office of any change in residency, use or status that would affect the exemption. Failing to report changes of use or ownership -- or wrongfully obtaining an exemption -- may cause an owner to be assessed for up to ten years of back taxes, costly penalties, and 15% interest per year.



**REPORT HOMESTEAD FRAUD:** *If you believe you have reliable information about someone engaging in fraud relating to exemptions or special property classifications, please call our Fraud Investigation Section at 954.357.6900 or use our online reporting system and we’ll check it out.*

## Additional Personal Exemptions for Eligible Seniors, Surviving Spouses, Disabled Veterans, Disabled Persons, and Others

Florida Statutes grant additional tax-saving exemptions to qualified property owners. **IMPORTANT: A Homestead Exemption is required as a pre-condition for obtaining nearly all of the following additional exemptions.** Below is what you must do to claim these additional exemptions. Please call **954.357.6830** if you have any questions.

**Additional \$25,000 Senior Citizen Exemption:** Applicants must be 65 years of age or older as of January 1 of the year for which they are applying and the total household adjusted gross income must not exceed \$24,916 (based on the 2008 limit). This amount is adjusted annually for inflation and **this exemption must be renewed annually**. You must complete an initial application between January 1-March 2, 2009, and provide us by June 1 with a copy of last year’s IRS tax return or proof of non-filing. Late filing is March 3 to September 18, 2009 (note: the Value Adjustment Board will charge a \$15 fee and require an additional form). **The renewal process is simplified and involves signing and returning a postcard, which is mailed to eligible seniors in early February.** This additional exemption saves you roughly \$300 per year in taxes.



**\$500 Widow’s/Widower’s Exemption:** Provide our office with a copy of your spouse’s death certificate, newspaper obituary, or memorial card. You are not eligible if you remarry. It will save you about \$10 each year in taxes.

**\$500 Disability/Blindness Exemption:** Provide our office with one letter from a Florida physician stating you are “totally and permanently disabled” or with a certificate from the Florida Division of Blind Services or the US Department of Veterans Affairs certifying the applicant to be legally blind. Unlike the Full Exemption (see *below*), this disability/blindness exemption has no household income requirement. It will save you approximately \$10 each year in taxes.

**\$5,000 Veteran’s Disability Exemption:** Provide us with a copy of your Certificate of Disability from the US Government or the US Department of Veterans Affairs (or predecessor agency). The disability must be military service-related and have occurred during a period of wartime service or by misfortune. The service-related disability must be to a degree of at least 10% before January 1 of the year for which you are applying. The **surviving spouse** of a disabled former service member may also claim this exemption, providing the spouse has not remarried. This exemption also requires the applicant be Homesteaded somewhere within Florida. It will save you about \$100 each year in taxes. Significant additional savings are available if you are a **Combat-Disabled Veteran** who was a Florida resident at the time you entered the military, was awarded a Purple Heart medal for combat injury, and who was age 65 or older as of January 1. Contact us for more information if you meet these additional conditions.



**Full Exemption for Veteran’s Service-Connected Total and Permanent Disability:** Provide us with a certificate from the US Government or US Department of Veterans Affairs showing you are an honorably discharged veteran with a service-connected total and permanent disability. Surviving spouses of qualifying veterans or of Florida-resident soldiers who died from service-connected causes while on active duty are also entitled to the full exemption (so long as the spouse has not remarried). This exemption will fully exempt you from paying all *ad valorem* property taxes each year.

**Full Exemption for Totally and Permanently Disabled Persons:** Provide our office with certificates from two licensed Florida physicians, or one certificate from the US Department of Veterans Affairs stating you are a: (1) quadriplegic OR (2) paraplegic, hemiplegic or other totally and permanently disabled person who must use a wheelchair for mobility or who is legally blind. For persons entitled to this exemption under the second (non-quadruplegic) category, the prior year’s gross income of all persons residing in the homestead must not exceed \$24,289 (based on the 2008 cap, adjusted annually for inflation). A statement of gross income must accompany the application. This exemption will fully exempt you from paying all *ad valorem* property taxes each year.

**“Granny Flat” Exemption:** Taxpayers who build additions or perform renovations to an existing Homestead to provide living quarters for a parent or grandparent may be entitled to an exemption equal to the amount of the new construction (up to 20% of the homestead value). This exemption is complicated, so please call us or visit our website for details.

Have you visited **WWW.BCPA.NET** recently? You can file for a Homestead Exemption online, research property records, download forms, view aerial photos and building sketches, use our helpful property tax tools, check our community outreach calendar, browse our research library, and much more.





115 South Andrews Avenue  
Room 111  
Fort Lauderdale, Florida 33301

Homestead renewal envelope

**RETURN SERVICE REQUESTED**

PRESORTED  
FIRST-CLASS MAIL  
U.S. POSTAGE  
**PAID**

Lori Parrish  
Broward County  
Property Appraiser

**OFFICIAL BUSINESS:  
HOMESTEAD EXEMPTION  
RENEWAL DOCUMENTS ENCLOSED**

DR-499  
R. 12/96

2009

BY LAW, ABSOLUTE DEADLINE FOR FILING IS MARCH 2.

Property Control No	514130-06-0050
<b>Renewal Application For</b>	
Do you own Tangible Personal Property used in connection with the herein described property? <input type="checkbox"/> Yes <input type="checkbox"/> No	
If yes, do you intend to file a Personal Property Return with the Property Appraiser this year? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Name and Address of Property Owner	Sunbeam Development Corp 1401 79 St Causaway Miami, FL 33141
Legal Description	MIRAMAH PARK OF COMMERCE PHASE III 161-29 B PARCEL E (CITY HALL PARCEL) CATTLE 6.00
I hereby apply for Agricultural or High-Water Recharge Classification of lands as listed on the card. As of January 1, of the year indicated on this card, the lands were primarily used for commercial agricultural purposes. I have examined all information printed on this card and hereby certify that it is correct.	
X Signature	Date: _____

**Instructions - Read Carefully**

If property description, use of the land, acreage, etc. is correct as listed on this card, sign and date below; then bring or mail this card immediately to the Property Appraiser's Office. You will then be sent a receipt.

If any information is incorrect or if the use of the land has changed since last year, contact the Property Appraiser's Office immediately.

Be sure to complete & sign below

**Please complete the information below**

The property herein described was on January 1st being used for a bona fide Agricultural or High-Water Recharge purpose.

- |  |                                     |
|--|-------------------------------------|
| <input type="checkbox"/> Pasture       | <input type="checkbox"/> High-water |
| <input type="checkbox"/> Citrus        | <input type="checkbox"/> Recharge   |
| <input type="checkbox"/> Forestry      | <input type="checkbox"/> Row Crop   |
| <input type="checkbox"/> Other         |                                     |
| <input type="checkbox"/> Used By Owner | <input type="checkbox"/> By Lessee  |

If used by Lessee, Name

and Address of Lessee

Has property been rezoned to non-agricultural use at the request of owner? ☐ Yes ☐ No

**Detach this card, affix postage on reverse side, mail before March 2.**

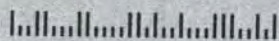
**Detach above card, affix postage on reverse side and mail before March 2.**

Lori Parrish - Broward County Property Appraiser  
115 South Andrews Avenue Room 111  
Fort Lauderdale, Florida 33301-1801

PRESORTED  
FIRST-CLASS MAIL  
US POSTAGE  
PAID  
Lori Parrish  
Broward County  
Property Appraiser

**IMPORTANT! AGRICULTURAL OR HIGH-WATER RECHARGE RENEWAL**

T1 P1\*\*\*\*\*SNGLP 1261  
514130-06-0050  
Sunbeam Development Corp  
1401 79 St Causaway  
Miami FL 33141



CATTLE 6.00

Ag Renewal Card - Front



Name \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

**RENEWAL OF AGRICULTURAL OR HIGH-WATER RECHARGE CLASSIFICATION OF LANDS**

Lori Parrish, CFA  
Broward County Property Appraiser  
115 S Andrews Ave. Room 111  
Fort Lauderdale, FL 33301-1801

---

Detach above card, affix postage and mail before March 2.

**Warning!! It is unlawful to give false information for the purpose of renewing an  
Agricultural or High-Water Recharge Classification.**


**BY LAW, THE ABSOLUTE DEADLINE FOR FILING IS MARCH 2.**

Ag Renewal Card - Back



DR-498

R. 01/93 **2009** BY LAW, ABSOLUTE DEADLINE FOR FILING IS MARCH 2.

Property Control No.	<b>484305-04-2000</b>
<b>Renewal Application For</b>	
	
Name and Address of Property Owner	Community Presbyterian Church Of Deerfield Beach 1920 SE 5th St Deerfield Beach, FL 33441
Legal Description	Type - 30 - CHURCH DEERFIELD BEACH 4-4 B LOTS 1 TO 6 BLK 23
I hereby apply for Property Tax Exemption as listed on this card. As of January 1, of the year indicated on this card, the property was primarily used for bona fide exempt purposes. I have examined all information printed on this card and hereby certify that it is correct.	
X _____ Date: _____ Signature	

**Instructions - Read Carefully**

This renewal card is valid only if all information entered on your original application for tax exemption still applies.

Be sure to complete & sign below.

**Warning!!** It is unlawful to give false information for the purpose of renewing property tax exemption.

**Detach this card, affix postage on reverse side, mail before March 2.**

**Detach above card, affix postage on reverse side and mail before March 2.**

Lori Parrish - Broward County Property Appraiser  
115 South Andrews Avenue Room 111  
Fort Lauderdale, Florida 33301-1801

PRESORTED  
FIRST-CLASS MAIL  
US POSTAGE  
**PAID**  
Lori Parrish  
Broward County  
Property Appraiser

**IMPORTANT! TAX EXEMPTION RENEWAL**

T1 P1 \*\*\*\*\*SNGLP 2727

484305-04-2000

Community Presbyterian Church  
Of Deerfield Beach

1920 SE 5th St

Deerfield Beach FL 33441

|||||

Non-profit Renewal Card - Back

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_

Zip \_\_\_\_\_

**Tax Exemption Renewal**

Lori Parrish, CFA

Broward County Property Appraiser

115 S Andrews Ave. Room 111

Fort Lauderdale, FL 33301-1801

-----▲-----  
Detach above card, affix postage and mail before March 2.

**If there is any change in the exemption status of this property or any portion thereof, contact the Property Appraiser's Office before March 2.**

**Warning!!** It is unlawful to give false information for the purpose of renewing property tax exemption.

**BY LAW, THE ABSOLUTE DEADLINE FOR FILING IS MARCH 2.**



Senior Renewal Card - Front

OK 1/29/09

Please Cut Along Dotted Line to Fit Card Into Return Envelope

**RENEWAL APPLICATION FOR ADDITIONAL EXEMPTION FOR PERSONS AGE 65 AND OVER**  
**THIS RENEWAL APPLICATION MUST BE RETURNED (POSTMARKED) TO**  
**THE PROPERTY APPRAISER NO LATER THAN MAY 1, 2009**  
**TAX YEAR 2009**

[FORM PA-501 SC (R)]

I hereby certify I am at least **65 years of age as of January 1, 2009**, and the total prior year (2008) adjusted gross income for all persons living in my household on January 1, 2009, does not exceed \$25,873. See reverse side for definitions. Supporting documentation is not required to be submitted unless requested by the Property Appraiser (and the documentation will be destroyed upon determination of eligibility unless the applicant requests return of the documentation). I hereby make application for the additional exemption for persons age 65 and over and affirm I do qualify for same under Florida Statutes. I am a permanent resident of the State of Florida and I own and occupy the property described below. I understand section 196.131(2), Florida Statutes provides any person who knowingly and willfully gives false information for the purpose of claiming homestead exemption is guilty of a misdemeanor of the first degree, punishable by a term of imprisonment not exceeding one year, or a fine not exceeding \$5,000, or both. **Further, under penalties of perjury, I declare that I have read the foregoing renewal application and the facts in it are true and correct.**

T1 P1 \*\*\*\*\*SNGLP

Packman, Harold & Sylvia Le  
Popick, Arlyne Et Al  
6931 Stonethrow Cir N  
St Petersburg, FL 33710



Parcel Id: 514023-AM-1940

Property Address: 1300 SW 124 TER #402P

SIGN HERE \_\_\_\_\_ PHONE # \_\_\_\_\_ DATE \_\_\_\_\_



OK 1/29/09  
SD

**RENEWAL APPLICATION FOR ADDITIONAL EXEMPTION FOR PERSONS AGE 65 AND OVER  
THIS RENEWAL APPLICATION MUST BE RETURNED (POSTMARKED) TO  
THE PROPERTY APPRAISER NO LATER THAN MAY 1, 2009.**

**DEFINING "HOUSEHOLD INCOME":**

In order to qualify for the additional homestead exemption for persons age 65 or older, the "Household Income" (cumulative "adjusted gross income") of ALL persons who lived in the home cannot exceed \$25,873. This exemption applies only to the property taxes levied by the taxing authorities granting the exemption.

**Section 196.075, Florida Statutes - Additional Homestead Exemption for Persons 65 and Older.** As used on this renewal application:

- (a) "Household" means a person or group of persons living together in a room or group of rooms as a housing unit, but the term does not include persons boarding in or renting a portion of the dwelling.
- (b) "Household Income" means the adjusted gross income, as defined in s.62 of the United States Internal Revenue Code, of all members of a household. If you file a tax return, this is the amount reported on IRS Form 1040, line 37 or IRS Form 1040A, line 21. If you do not file a tax return, adjusted gross income includes but is not limited to wages, salaries, tips, taxable interest, ordinary dividends, capital gain distributions, taxable IRA distributions, taxable pension and annuities, unemployment compensation, and taxable social security benefits.



115 South Andrews Avenue  
Room 111  
Fort Lauderdale, Florida 33301

Senior Renewal #10 Envelope

PRESORTED  
FIRST-CLASS MAIL  
U.S. POSTAGE  
**PAID**

Lori Parrish  
Broward County  
Property Appraiser

**SENIOR HOMESTEAD  
RENEWAL FORM ENCLOSED:**

**TIMELY ACTION REQUIRED**



**FROM**

-----

-----

-----

Senior Renewal and New Senior #9 BRE (same #9 envelope is used for senior renewal mailing and new senior mailing)



115 South Andrews Avenue  
Room 111  
Fort Lauderdale, Florida 33301-1899

Postage  
Required  
Post Office will  
not deliver  
without proper  
postage

**ATTN: SENIOR EXEMPTIONS**





Broward Co

115 S

Fort Lauderdale, Florida 33301

954-357-6830 • Fax 954-357-8474

www.bcpa.net

BRANCH OFFICE: 1 North University Drive, Room 111-A  
Plantation, Florida 33324 • 954-370-3700

Senior Renewal Letter

Dear Senior Homeowner(s):

As a property owner who previously qualified for the Senior's Additional Homestead Exemption, you are eligible to use the simplified renewal process to protect these valuable tax savings. **It takes just two easy steps to complete your renewal.**

If your adjusted gross household income for 2008 was **\$25,873 or less** -- all you need to do is:

- (1) **Sign and date** the enclosed renewal card, and
- (2) **Mail it back to my office on or before May 1, 2009.**

That's all there is to the renewal process.

Note: To prevent fraud and safeguard the rights of all taxpayers, State law gives our office the right to randomly audit financial records of any renewal applicant.

If you have any questions about the renewal process, please contact our office at 954-357-6830 or visit our website at **www.bcpa.net**.

Sincerely,

A handwritten signature in black ink that reads "Lori Parrish". The signature is written in a cursive, flowing style.

LORI PARRISH, CFA  
Broward County Property Appraiser  
[lori@bcpa.net](mailto:lori@bcpa.net)

P.S. - If you have any ideas for improving our office, please drop me a note.

# Senior Sworn Statement - Front



## Sworn Statement of Adjusted Gross Income of Household and Return Senior Citizen Exemption For Persons Age 65 and Over

DR 501SC  
R. 12/04

Section 196.075 (4)(d), Florida Statutes

Application Year 2009

☒ INITIAL  
☐ RENEWAL

This statement and return must be completed annually and signed by applicants for the Exemption for Persons 65 and over, Section 196.075, Florida Statutes. This statement and return must be filed with the property appraiser on or before **March 1st**.

\*\*\*\*\*SNGLP T1 P1 1723

Woods, Joy S  
3021 Ellemere B  
Deerfield Beach, FL 33442



Parcel ID # 484203-BM-0390  
Property Address: 3021 ELLESMERE B

**Part A:** Names of all persons residing in housing unit comprising homestead (excluding renters and boarders) for which exemption is requested. Complete for all members living in your household. (For additional parties please attach a separate sheet.)

Name	Date of Birth	Social Security Number	Does Person File Federal Income Tax Return?	Adjusted Gross Income*

**Total Adjusted Gross Income for all Household members**

\$ \_\_\_\_\_

\*NOTE: If a person does not file an IRS return, he/she must complete and attach Part E of this form.

### \*Part B:

☐ No, I (we) do not file a Federal Income Tax Return Form 1040. I (we) agree to submit Social Security Statement (SSA 1099) before June 1; and I (we) attach IRS Form 4506, Request for Copy or Transcript of Tax Form, to prove household members are not required to file tax return with IRS. Complete Part E, Statement of Income, for all members living in your household. (Attach additional sheet for each household member.)

### \*Part C:

☐ Yes, I (we) file Federal Income Tax Return Form 1040 series. I (we) agree to submit a copy of Form 1040 or Form 4868, Application for Automatic Extension of Time to File U.S. Individual Income Tax Return, if applicable, and the Wage and Tax Statement (W-2 Form) for review by the Property Appraiser. Attach prior year federal income tax return(s) and Wage and Tax Statement(s) (W-2) for all persons listed above. Prior year's IRS 1040 Form or Form 4868 should be submitted by May 1 for prompt consideration and no further documentation will be accepted after June 1.

### Part D:

I hereby authorize the Property Appraiser's Office to obtain information from utility companies and other sources necessary to determine my continuing eligibility for the exemption(s) applied for. NOTE: If all information is not received by June 1st, your application will not be processed.

I hereby certify that I am at least 65 years of age as of January 1 of the year for which this exemption is applied (attach proof of age) and that the total prior year adjusted gross income of all persons living in the household on January 1 of the year for which this exemption is applied does not exceed the adjusted gross income as defined in s. 62 of the United States Internal Revenue Code. You must contact your county property appraiser to obtain the maximum household adjusted gross income amount. This amount is subject to change each year.

I hereby make application for the exemptions indicated and affirm that I do qualify for same under Florida Statutes. I am a permanent resident of the State of Florida and I own and occupy the property described above. I understand that section 196.131(2), Florida Statutes, provides that any person who knowingly and willfully gives false information for the purpose of claiming homestead exemption is guilty of a misdemeanor of the first degree, punishable by a term of imprisonment not exceeding 1 year or a fine not exceeding \$5,000 or both. Further, under penalties of perjury, I declare that I have read the foregoing application and Statement of Adjusted Gross Income and the facts in it are true and correct.

Applicant's Signature

Phone Number

Date

\*Supporting documentation is not required to be submitted if you are filing for renewal of the additional homestead exemption, unless requested by the Property Appraiser. Before filing for renewal, contact the Property Appraiser's office for instructions.



**Part E:**

DR 501SC  
R. 12/04

Worksheet for persons who have not filed IRS Form 1040.

NOTE: If a person's income is below the filing thresholds for the IRS and the person does not file an income tax return, list the person's gross income in this part. If a person intends to take deductions from gross income, file Form 1040 and complete part C; enter adjusted gross income in part A. Complete additional Part E of form for each person who does not file income tax return.

Earned Income	\$ _____	Veterans Administration Benefits	\$ _____
Investment Income	\$ _____	Income from Retirement Plans	\$ _____
Capital Gains or (Losses)	\$ _____	Income from Pensions	\$ _____
Interest Income	\$ _____	Income from Trust Funds	\$ _____
Rents	\$ _____	Other (specify)	\$ _____
Royalties	\$ _____		
Dividends	\$ _____		
Annuities	\$ _____		
Social Security Benefits*	\$ _____		
<b>Total Income for this Household Member Who does not File a Federal Income Tax Return</b>		<b>\$ _____</b>	

**Instructions:**

In order to qualify for an additional homestead exemption of up to \$25,000 for persons age 65 years or older, the "Household Income" (cumulative "adjusted gross income") of all persons living in the home cannot exceed the maximum household adjusted gross income. (See definition (b) below or reverse side.) This exemption applies only to the property taxes levied by the taxing authority granting the exemption.

Definitions: Section 196.075, Florida Statutes. Additional homestead exemption for persons 65 and older. -- As used on this application, the terms:

(a) "Household" means a person or group of persons living together in a room or group of rooms as a housing unit, but the term does not include persons boarding in or renting a portion of the dwelling.

(b) "Household income" means the adjusted gross income, as defined in s. 62 of the United States Internal Revenue Code, of all members of a household. (This is the "Adjusted Gross Income" amount reported on IRS Form 1040.)

(Examples of supporting documentation includes, rental receipts, pension statements, annuity statements, income statements, interest statements, and any Wage and Earnings Statements; Form W series forms, Form 1099 series forms, Form 1042 series forms, Form 1065 series forms, Social Security Benefits Worksheets, etc., and/or Form 4506, or any other documentation supporting the applicant's household income.) **NOTE: Income documentation of all persons living in the household should be submitted before May 1 for prompt consideration. No documentation can be accepted after June 1. Supporting documentation will be destroyed upon determination of eligibility unless the applicant requests return of the documentation.**

According to the I.R.S., a person cannot file Form 1040EZ if he/she has taxable social security benefits, and the person must file either Form 1040 or Form 1040A. \*If you have social security benefits, according to I.R.S. they are not automatically included in adjusted gross income. If your gross income is below the filing thresholds for federal income tax, consult I.R.S. to verify that no portion of Social Security income is included in adjusted gross income to meet the current Florida limit on adjusted gross income as factored for cost of living.

If your combined benefits and other income exceed other applicable thresholds, some portions of your Social Security income may be taxable. Consult I.R.S. for portions of Social Security income that may be taxable based on current formulas.

NOTE: According to the I.R.S., social security benefits include monthly survivor and disability benefits. They do not include supplemental security (SSI) payments, which are not taxable.

NOTE: Disclosure of your social security number is not mandatory in order to receive this exemption if it was provided to the property appraiser to receive the regular homestead exemption. Disclosure of your social security number is mandatory for the regular homestead exemption. It is required by section 196.011(1), Florida Statutes. If you have not already provided your social security number to the property appraiser it should be provided now. The social security number will be used to verify taxpayer identity information, homestead exemption information submitted to property appraisers, and intangible tax information submitted to the Department of Revenue.



**Broward County Property Appraiser's Office**

115 South Andrews Avenue, Room 111

Fort Lauderdale, Florida 33301

954-357-6830 • Fax 954-357-8474

[www.bcpa.net](http://www.bcpa.net)

**BRANCH OFFICE:** 1 North University Drive, Room 111-A

Plantation, Florida 33324 • 954-370-3700

Dear Senior Homeowner(s):

Many Florida senior citizens are eligible to claim the **Senior's Additional Homestead Exemption**. This exemption -- which applies only to the County's portion of the taxes, plus the city portion of taxes for residents of the 30 Broward cities that also adopted the exemption -- can **save you approximately \$300 each year in taxes**.

To qualify for the Senior Exemption, at least one Homesteaded owner must be age **65 or older as of January 1, 2009** and the **combined adjusted gross income of your household for 2008 must not exceed \$25,873**. If you believe you will qualify for this valuable exemption, please follow these steps:

**IF YOU FILE A FEDERAL INCOME TAX RETURN:**

1. Complete Parts (A), (C) and (D) of the Sworn Statement of Adjusted Gross Income of Household.
2. Submit the Sworn Statement of Adjusted Gross Income of Household to our office on or before the **MARCH 2, 2009 DEADLINE**.
3. Submit copies of your 2008 Income Tax Return Form 1040 and W-2 Forms for all persons residing in your home (excluding renters/boarders) to our office **no later than JUNE 1, 2009**.

**IF YOU DO NOT FILE A FEDERAL INCOME TAX RETURN:**

1. Complete Parts (A), (B), (D) and (E) of the Sworn Statement of Adjusted Gross Income of Household.
2. Complete Lines 1 through 4 of the IRS Form 4506-T and sign the form. (*Note: There is no fee for requesting this information from the IRS.*)
3. Submit the Sworn Statement of Adjusted Gross Income of Household, proof of age, and IRS Form 4506-T to our office on or before the **MARCH 2, 2009 DEADLINE**.
4. Submit a copy of your Social Security Statement (SSA-1099) to our office by **JUNE 1, 2009**. (*Note: the Social Security Administration will mail the SSA-1099 Form to you by February 1.*)

If you have any questions about applying for this exemption, please contact our office at 954-357-6830 or visit our website at [www.bcpa.net](http://www.bcpa.net).

Sincerely,

A handwritten signature in black ink that reads "Lori Parrish". The signature is fluid and cursive, with the first name "Lori" and last name "Parrish" clearly distinguishable.

LORI PARRISH, CFA

Broward County Property Appraiser

[lori@bcpa.net](mailto:lori@bcpa.net)

Printed on recycled paper.



115 South Andrews Avenue  
Room 111  
Fort Lauderdale, Florida 33301

New Senior # 10 envelope

PRESORTED  
FIRST-CLASS MAIL  
U.S. POSTAGE  
**PAID**

Lori Parrish  
Broward County  
Property Appraiser

**SENIOR HOMESTEAD  
APPLICATION ENCLOSED:**

**TIMELY ACTION REQUIRED**



Form **4506-T**

(Rev. January 2008)

Department of the Treasury  
Internal Revenue Service

# Request for Transcript of Tax Return

► Do not sign this form unless all applicable lines have been completed.  
Read the instructions on page 2.

► Request may be rejected if the form is incomplete, illegible, or any required line was blank at the time of signature.

OMB No. 1545-1872

**Tip:** Use Form 4506-T to order a transcript or other return information free of charge. See the product list below. You can also call 1-800-829-1040 to order a transcript. If you need a copy of your return, use **Form 4506**, Request for Copy of Tax Return. There is a fee to get a copy of your return.

<b>1a</b> Name shown on tax return. If a joint return, enter the name shown first.	<b>1b</b> First social security number on tax return or employer identification number (see instructions)
<b>2a</b> If a joint return, enter spouse's name shown on tax return	<b>2b</b> Second social security number if joint tax return
<b>3</b> Current name, address (including apt., room, or suite no.), city, state, and ZIP code	
<b>4</b> Previous address shown on the last return filed if different from line 3	
<b>5</b> If the transcript or tax information is to be mailed to a third party (such as a mortgage company), enter the third party's name, address, and telephone number. The IRS has no control over what the third party does with the tax information.	

**Caution: DO NOT SIGN** this form if a third party requires you to complete Form 4506-T, and lines 6 and 9 are blank.

**6 Transcript requested.** Enter the tax form number here (1040, 1065, 1120, etc.) and check the appropriate box below. Enter only one tax form number per request. ► \_\_\_\_\_

**a Return Transcript**, which includes most of the line items of a tax return as filed with the IRS. Transcripts are only available for the following returns: Form 1040 series, Form 1065, Form 1120, Form 1120A, Form 1120H, Form 1120L, and Form 1120S. Return transcripts are available for the current year and returns processed during the prior 3 processing years. Most requests will be processed within 10 business days . . . . . ☐

**b Account Transcript**, which contains information on the financial status of the account, such as payments made on the account, penalty assessments, and adjustments made by you or the IRS after the return was filed. Return information is limited to items such as tax liability and estimated tax payments. Account transcripts are available for most returns. Most requests will be processed within 30 calendar days . . . ☐

**c Record of Account**, which is a combination of line item information and later adjustments to the account. Available for current year and 3 prior tax years. Most requests will be processed within 30 calendar days . . . . . ☐

**7 Verification of Nonfiling**, which is proof from the IRS that you **did not** file a return for the year. Most requests will be processed within 10 business days . . . . . ☐

**8 Form W-2, Form 1099 series, Form 1098 series, or Form 5498 series transcript.** The IRS can provide a transcript that includes data from these information returns. State or local information is not included with the Form W-2 information. The IRS may be able to provide this transcript information for up to 10 years. Information for the current year is generally not available until the year after it is filed with the IRS. For example, W-2 information for 2006, filed in 2007, will not be available from the IRS until 2008. If you need W-2 information for retirement purposes, you should contact the Social Security Administration at 1-800-772-1213. Most requests will be processed within 45 days . . . . . ☐

**Caution:** If you need a copy of Form W-2 or Form 1099, you should first contact the payer. To get a copy of the Form W-2 or Form 1099 filed with your return, you must use Form 4506 and request a copy of your return, which includes all attachments.

**9 Year or period requested.** Enter the ending date of the year or period, using the mm/dd/yyyy format. If you are requesting more than four years or periods, you must attach another Form 4506-T. For requests relating to quarterly tax returns, such as Form 941, you must enter each quarter or tax period separately.

\_\_\_\_ / \_\_\_\_ / \_\_\_\_      \_\_\_\_ / \_\_\_\_ / \_\_\_\_      \_\_\_\_ / \_\_\_\_ / \_\_\_\_      \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Signature of taxpayer(s).** I declare that I am either the taxpayer whose name is shown on line 1a or 2a, or a person authorized to obtain the tax information requested. If the request applies to a joint return, **either** husband or wife must sign. If signed by a corporate officer, partner, guardian, tax matters partner, executor, receiver, administrator, trustee, or party other than the taxpayer, I certify that I have the authority to execute Form 4506-T on behalf of the taxpayer.

<b>Sign Here</b>	Signature (see instructions)	Date	Telephone number of taxpayer on line 1a or 2a (      )
	Title (if line 1a above is a corporation, partnership, estate, or trust)		
	Spouse's signature	Date	

## General Instructions

**Purpose of form.** Use Form 4506-T to request tax return information. You can also designate a third party to receive the information. See line 5.

**Tip.** Use Form 4506, Request for Copy of Tax Return, to request copies of tax returns.

**Where to file.** Mail or fax Form 4506-T to the address below for the state you lived in, or the state your business was in, when that return was filed. There are two address charts: one for individual transcripts (Form 1040 series and Form W-2) and one for all other transcripts.

If you are requesting more than one transcript or other product and the chart below shows two different RAVS teams, send your request to the team based on the address of your most recent return.

**Note.** You can also call 1-800-829-1040 to request a transcript or get more information.

### Chart for individual transcripts (Form 1040 series and Form W-2)

If you filed an individual return and lived in:	Mail or fax to the "Internal Revenue Service" at:
District of Columbia, Maine, Maryland, Massachusetts, New Hampshire, New York, Vermont	RAIVS Team Stop 679 Andover, MA 05501  978-247-9255
Alabama, Delaware, Florida, Georgia, North Carolina, Rhode Island, South Carolina, Virginia	RAIVS Team P.O. Box 47-421 Stop 91 Doraville, GA 30362  770-455-2335
Kentucky, Louisiana, Mississippi, Tennessee, Texas, a foreign country, or A.P.O. or F.P.O. address	RAIVS Team Stop 6716 AUSC Austin, TX 73301  512-460-2272
Alaska, Arizona, California, Colorado, Hawaii, Idaho, Iowa, Kansas, Minnesota, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, Oregon, South Dakota, Utah, Washington, Wisconsin, Wyoming	RAIVS Team Stop 37106 Fresno, CA 93888  559-456-5876
Arkansas, Connecticut, Illinois, Indiana, Michigan, Missouri, New Jersey, Ohio, Pennsylvania, West Virginia	RAIVS Team Stop 6705-B41 Kansas City, MO 64999  816-292-6102

### Chart for all other transcripts

If you lived in or your business was in:	Mail or fax to the "Internal Revenue Service" at:
Alabama, Alaska, Arizona, Arkansas, California, Colorado, Florida, Georgia, Hawaii, Idaho, Iowa, Kansas, Louisiana, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, Oregon, South Dakota, Tennessee, Texas, Utah, Washington, Wyoming, a foreign country, or A.P.O. or F.P.O. address	RAIVS Team P.O. Box 9941 Mail Stop 6734 Ogden, UT 84409  801-620-6922
Connecticut, Delaware, District of Columbia, Illinois, Indiana, Kentucky, Maine, Maryland, Massachusetts, Michigan, New Hampshire, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Rhode Island, South Carolina, Vermont, Virginia, West Virginia, Wisconsin	RAIVS Team P.O. Box 145500 Stop 2800 F Cincinnati, OH 45250  859-669-3592

**Line 1b.** Enter your employer identification number (EIN) if your request relates to a business return. Otherwise, enter the first social security number (SSN) shown on the return. For example, if you are requesting Form 1040 that includes Schedule C (Form 1040), enter your SSN.

**Line 6.** Enter only one tax form number per request.

**Signature and date.** Form 4506-T must be signed and dated by the taxpayer listed on line 1a or 2a. If you completed line 5 requesting the information be sent to a third party, the IRS must receive Form 4506-T within 60 days of the date signed by the taxpayer or it will be rejected.

**Individuals.** Transcripts of jointly filed tax returns may be furnished to either spouse. Only one signature is required. Sign Form 4506-T exactly as your name appeared on the original return. If you changed your name, also sign your current name.

**Corporations.** Generally, Form 4506-T can be signed by: (1) an officer having legal authority to bind the corporation, (2) any person designated by the board of directors or other governing body, or (3) any officer or employee on written request by any principal officer and attested to by the secretary or other officer.

**Partnerships.** Generally, Form 4506-T can be signed by any person who was a member of the partnership during any part of the tax period requested on line 9.

**All others.** See Internal Revenue Code section 6103(e) if the taxpayer has died, is insolvent, is a dissolved corporation, or if a trustee, guardian, executor, receiver, or administrator is acting for the taxpayer.

**Documentation.** For entities other than individuals, you must attach the authorization document. For example, this could be the letter from the principal officer authorizing an employee of the corporation or the Letters Testamentary authorizing an individual to act for an estate.

### Privacy Act and Paperwork Reduction Act Notice

We ask for the information on this form to establish your right to gain access to the requested tax information under the Internal Revenue Code. We need this information to properly identify the tax information and respond to your request. Sections 6103 and 6109 require you to provide this information, including your SSN or EIN. If you do not provide this information, we may not be able to process your request. Providing false or fraudulent information may subject you to penalties.

Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation, and cities, states, and the District of Columbia for use in administering their tax laws. We may also disclose this information to other countries under a tax treaty, to federal and state agencies to enforce federal nontax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by section 6103.

The time needed to complete and file Form 4506-T will vary depending on individual circumstances. The estimated average time is: **Learning about the law or the form**, 10 min.; **Preparing the form**, 12 min.; and **Copying, assembling, and sending the form to the IRS**, 20 min.

If you have comments concerning the accuracy of these time estimates or suggestions for making Form 4506-T simpler, we would be happy to hear from you. You can write to the Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, IR-6526, Washington, DC 20224. Do not send the form to this address. Instead, see *Where to file* on this page.



# Personal Property Postcards - Front

LORI PARRISH  
BROWARD COUNTY  
PROPERTY APPRAISER  
115 South Andrews Avenue  
Room 111  
Fort Lauderdale, Florida 33301  
www.bcpa.net

Tax Year 2009

PRESORTED  
FIRST-CLASS MAIL  
U.S. POSTAGE  
PAID  
Lori Parrish  
Broward County  
Property Appraiser

LORI PARRISH  
BROWARD COUNTY  
PROPERTY APPRAISER  
115 South Andrews Avenue  
Room 111  
Fort Lauderdale, Florida 33301  
www.bcpa.net

Tax Year 2009

PRESORTED  
FIRST-CLASS MAIL  
U.S. POSTAGE  
PAID  
Lori Parrish  
Broward County  
Property Appraiser

71\*1\*\*\*\*\*MIXED AADC 333  
Account # C00005220190-E  
LEVITT-WEINSTEIN  
MEMORIAL CHAPELS INC  
H St Pmb 6126,250  
Blaine WA 98230-4033  
|||

71\*4\*\*\*\*\*MIXED AADC 333  
Account # C00001231235-A  
CACHE FLOW INC  
450 N Mary Ave  
Sunnyvale CA 94085-4121  
|||

018  
1/1/09

LORI PARRISH  
BROWARD COUNTY  
PROPERTY APPRAISER  
115 South Andrews Avenue  
Room 111  
Fort Lauderdale, Florida 33301  
www.bcpa.net

Tax Year 2009

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Tax Year 2009

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FIRST-CLASS MAIL  
U.S. POSTAGE  
PAID  
Lori Parrish  
Broward County  
Property Appraiser

71\*7\*\*\*\*\*MIXED AADC 333  
Account # C00008514198-M  
TOYOTA MOTOR SALES USA INC  
19001 S Western Ave G 301  
Torrance CA 90501-2991  
|||

71\*10\*\*\*\*\*MIXED AADC 333  
Account # 494234035250  
EDOVARZIN, LOURDYVES  
6709A Cambium Pine Ave  
Las Vegas NV 89130  
|||

LORI PARRISH  
BROWARD COUNTY  
PROPERTY APPRAISER  
115 South Andrews Avenue  
Room 111  
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Tax Year 2009

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U.S. POSTAGE  
PAID  
Lori Parrish  
Broward County  
Property Appraiser

71\*13\*\*\*\*\*MIXED AADC 333  
Account # 494307050060  
SPENCE, EILEEN LE  
SPENCE, ROBERT J JR & SPENCE, S A  
245 S 56 St M H #8  
Mesa AZ 85206  
|||

71\*16\*\*\*\*\*MIXED AADC 333  
Account # C00007695253-Z  
SALLY BEAUTY SUPPLY #3130  
%SALLY BEAUTY CO INC  
PO Box 90220-tax Dept  
Denton TX 76202  
|||

LORI PARRISH  
BROWARD COUNTY  
PROPERTY APPRAISER  
115 South Andrews Avenue  
Room 111  
Fort Lauderdale, Florida 33301  
www.bcpa.net

Tax Year 2009

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PAID  
Lori Parrish  
Broward County  
Property Appraiser

LORI PARRISH  
BROWARD COUNTY  
PROPERTY APPRAISER  
115 South Andrews Avenue  
Room 111  
Fort Lauderdale, Florida 33301  
www.bcpa.net

Tax Year 2009

PRESORTED  
FIRST-CLASS MAIL  
U.S. POSTAGE  
PAID  
Lori Parrish  
Broward County  
Property Appraiser

71\*19\*\*\*\*\*MIXED AADC 333  
Account # C00007001237-B  
PERSONNEL ONE 1  
% TAX DEPT  
222 W Las Colinas Blvd1250 E  
Irving TX 75039  
|||

71\*22\*\*\*\*\*MIXED AADC 333  
Account # C00000020217-M  
MB FINANCIAL BANK NA  
ADVANCED PROP TAX COMPL  
1611 N I-35e Ste 230  
Carrollton TX 75006  
|||











## Personal Property Return (DR405) - Back

[illegible]

GENERAL INSTRUCTIONS

Complete this Personal Property Tax Return in accordance with the instructions provided herein as your declaration of personal property situated in this county. If any schedule has insufficient space, attach a separate sheet. Please print or type except for signature.

WHAT TO REPORT ON THIS RETURN:

1. Tangible Personal Property - include all goods, chattels, and other articles of value (but not certain vehicles) capable of manual possession and whose chief value is intrinsic to the article itself.
2. Items of inventory held for lease to customers in the ordinary course of business, rather than for sale, shall be deemed inventory only prior to the initial lease of such items and **MUST** be reported after their initial lease or rental as equipment and/or furniture or fixtures.
3. **ALL FULLY DEPRECIATED ITEMS MUST BE REPORTED AT ORIGINAL COST WHETHER WRITTEN OFF OR NOT.**
4. Property personally owned, but used in the business must be reported.

DO NOT INCLUDE:

1. Intangible Personal Property - that is, money, all evidences of debt owed to the taxpayer, all evidence of ownership in a corporation, etc.
2. Household Goods such as wearing apparel, appliances, furniture, and other items ordinarily found in the home and used for the comfort of the owner and his family, and not used for commercial purposes.
3. Automobiles, Trucks, and Other Licensed Vehicles - These are not taxable as personal property. (EXCEPTION: The equipment, on certain vehicles, is taxable as personal property and must be reported. Example- power cranes, air compressors, and other equipment designed as a tool rather than primarily as a hauling vehicle.)
4. Inventory - Those chattels consisting of items commonly referred to as goods, wares, and merchandise which are held for sale or lease to customers in the ordinary course of business.

VALUATION OF PERSONAL PROPERTY:

All property located in this county as of January 1 must be reported at 100 % of the original total cost. Include sales tax, transportation, handling, and installation charges if incurred. Report the total cost of all assets.

ADJUSTMENTS TO VALUES - TAXPAYER'S ESTIMATE OF FAIR MARKET VALUE:

Enter only UNADJUSTED figures in areas calling for Original Cost. However, Florida law provides that the taxpayer shall also provide an estimate of the current fair market value of the property. An adjustment is a variation from purchase price paid. Adjusted figures **MUST** be explained on an attached supplemental schedule. Such schedules are considered part of the return.

LOCATION OF PERSONAL PROPERTY:

With the exception noted in the following paragraph, a SEPARATE personal property return must be filed for each location in the county. Additional forms will be mailed on request; contact your county property appraiser's office.

Owners of vending machines, LP/Propane tanks and similar free standing property at many locations may submit a single schedule in lieu of individual property statements, but may be required by the Property Appraiser to provide a list of site addresses. Owners that previously reported on a DR-405E or other owners of a similarly integrated property may submit a single schedule.

INFORMATION REGARDING THE TAX LAWS OF FLORIDA

§192.042, Florida Statutes - DATE OF ASSESSMENT - Tangible Personal Property on January 1.

§193.062, Florida Statutes - DATES FOR FILING RETURNS - Tangible Personal Property Jan. 1 - Apr. 1.

§193.072, Florida Statutes - PENALTIES - For failure to file a return, 25% of the total tax levied against the property for each year that no return is filed; for filing after the due date, 5% of the total tax levied against the property covered by that return for each year, for each month, or portion thereof, that a return is filed after the due date, but not to exceed 25% of the total tax; for unlisted property, 15% of the tax attributable to the omitted property.

§196.021, Florida Statutes - TAX RETURNS TO SHOW ALL EXEMPTIONS AND CLAIMS - It is the duty of the taxpayer to set forth any legal exemption from taxation to which he may be entitled. The failure to do so shall result in any such exemption being disallowed for that tax year.

§837.06, Florida Statutes - Whoever knowingly makes a false statement in writing with the intent to mislead a public servant in the performance of his official duty shall be guilty of a misdemeanor of the second degree, punishable as provided in §775.082, §775.083, or §775.084.

In the appropriate schedule list the original installed cost for assets of your business. Assets in each schedule must be grouped by year of acquisition.

The figure you enter as "original cost" must include the total original installed cost of your equipment, before any allowance for depreciation. Include sales tax, freight-in, handling, and installation costs. If a trade-in was deducted from the invoice price, enter the invoice price.

Add back investment credits taken for federal income tax purposes if those were deducted from the original cost. **INCLUDE ALL FULLY DEPRECIATED ITEMS AT ORIGINAL COST, WHETHER WRITTEN OFF OR NOT.**

If you own equipment that is out on a loan, rental or lease basis to others, report it on the appropriate schedule and enter the totals on Line 22.

List each item of tangible personal property separately in the appropriate schedule except for "classes" of personal property. A class is defined as items which are SUBSTANTIALLY similar in function, use, and age. Do not use the terms "VARIOUS" or "SAME AS LAST YEAR". This is inadequate reporting and may subject you to penalties for **FAILURE TO FILE**.

List all items of furniture and fixtures, all machinery and equipment, supplies, and certain types of equipment attached to mobile homes. All expensed items must be entered at original cost.

For each item, report your estimate of the current fair market value of the property and your estimate of the condition of that item (Good, Average, Poor). All expensed items must be entered at original installed cost.

Line 14 - Farm, Grove, and Dairy Equipment:

List all types of agricultural equipment you owned as of January 1. Describe property by type, manufacturer, model number, and year acquired. The following is a partial list of the types of equipment which are to be reported: bulldozers, draglines, mowers, balers, tractors, all types of dairy equipment, pumps, irrigation pipe - show feet of main line and sprinklers, hand and power sprayers, heaters, discs, fertilizer distributors, etc.

Line 16, 16a - Hotel, Motel, Apartment & Rental Units (Household Goods):

List all household goods, i.e. furniture, appliances and equipment used in rental or other commercial property. Both residents and non-residents must report if house, condo, apartment, etc. is rented at any time during the year.

Line 17 - Mobile Home Attachments:

For each of the following types of mobile home attachments, enter the number of items of that type which you owned as of January 1, the year of purchase, the size (length X width), and the original installed cost: Awning, Carport, Patio Roof, Trailer Cover, Screened Porch or Room, Cabana, Open Porch, Utility Room, etc.

Line 20 - Leasehold Improvements - i.e., Physical Modifications to Leased Property:

If you have made any improvements (including modifications and additions) to property which you lease, list the original cost of the improvements. Improvement must be grouped by type and year of installation. Leasehold improvement - Carpeting, Paneling, Shelving, Cabinets, etc.

**IMPORTANT: ATTACH ITEMIZED LIST OR DEPRECIATION SCHEDULE SHOWING INVENTORY OF INDIVIDUAL IMPROVEMENTS.**

Line 23 - Supplies:

Enter the average cost of supplies that are on hand, including expensed supplies, such as stationery and janitorial supplies, linens, silverware, etc. which may not have been recorded separately on your books. Include items which you carry in your inventory account but which do NOT come within the definition of "inventory" subject to exemption.

Leased, Loaned, and Rented Equipment:

If you borrow, rent or lease equipment from others complete the schedule by entering the name and address of the owner or lessor and a description of the equipment; year you acquired it; year of manufacture, if known; the rent per month; and the amount it would have originally cost had you purchased the equipment new.



Property Appraiser  
1234 Main Street  
Anywhere, Florida 11111-2222

Personal Property Instructions (DR405 I) - Back

Tangible Personal Property Tax Return  
Confidential §8193.074 F.S.  
As Required by §8193.052 & 193.062 F.S. Return to  
County Property Appraiser By April 1 to Avoid Penalties  
State of Florida, County of  
Business Name (DBA - Doing Business As) and  
Mailing Address

Account Number  
Any Business  
5678 Main St  
Allover, FL 55555-9890  
Federal Employer Ident. No.  
[59]-[00][00][00][00]  
Social Security Number  
[ ]-[ ]-[ ]-[ ]-[ ]-[ ]

address is incorrect make necessary corrections

to audit with all records kept by you.  
are subject to penalties.

name and telephone number of Owner or Person in charge of this Business.  
son in charge  
Corporation USA  
Telephone BR549

all location of Property for Which this Return is Filed (Street Address, -JAIL P.O. Box)  
Main St., FL, USA 07891

is or farm located within the incorporated limits of a City? Yes \_\_\_ No ☒ X

Tangible Personal Property Tax Return Under Any Other Name? Yes \_\_\_ No ☒ X  
name. Exactly as it appeared on your most recent Personal Property Tax Bill or  
Tax Return.

PERSONAL PROPERTY SUMMARY  
SUMMARY SCHEDULE ONLY. The Schedules on the REVERSE SIDE  
entered in detail and TOTALS entered below. ATTACHED LIST or  
SCHEDULE showing original Cost & Date of Acquisition.

5. Date you began business in this county: 1976 Fiscal year Oct. 1 to Sept. 30  
6a. Although my fiscal year ended prior to December 31, Yes ☒ X No \_\_\_  
6. Describe Type or Nature of Your Business: Sales  
7. Trade Level (Check as many as apply) Retail ☒ Wholesale ☐ Manufacturing ☐  
Professional ☐ Service ☐ Agriculture ☐ Leasing/Rental ☐ Other ☒ X  
8. Did you file a Tangible Personal Property Return in this county last year? Yes \_\_\_ No \_\_\_  
If so, under what name and where? See # 1 & 2  
9. Farmer owner of the Business: If applicable  
9a. If Business sold, to whom? Date Sold

TAXPAYER'S ESTIMATE  
OF FAIR MARKET  
VALUE  
840.00 1233.00  
2000.00 4043.00  
6840.00 11342.00

ORIGINAL  
INSTALLED  
COST  
1233.00 4043.00 11342.00

APPRAISER'S  
USE ONLY

11. EDP Equipment, Computers, Word Processors	840.00	1233.00	
12. Store, Bar & Lounge, and Restaurant Furniture & Equipment, Etc.	2000.00	4043.00	
13. Machinery and Manufacturing Equipment	6840.00	11342.00	
14. Farm, Grove, and Dairy Equipment			
15. Professional, Medical, Dental & Laboratory Equipment			
16. Hotel, Motel, & Apartment Complex			
16a. Rental Units - Shave, Hairing, Furniture, Drapes & Appliances			
17. Mobile Home Attachments (Carport, Utility Bldg., Coldroom, Porch, Etc.)			
18. Service Station & Bulk Plant Equipment - Underground Tanks, Lifts, Tools			
19. Signs - Billboard, Pole, Wall, Portable, Directional, Etc.			
20. Leasehold improvements must be grouped by type, year of installation and description			
21. Pollution Control Equipment	5000.00	8000.00	
22. Equipment owned by you but rented, leased or held by others			
23. Supplies - Not held for resale		1000.00	
24. Other - Please Specify			
TOTAL PERSONAL PROPERTY	14680.00	25618.00	

Under penalties of perjury, I declare that I have read the foregoing tax return and the  
accompanying schedules and statements and that the facts stated in them are true. If  
prepared by someone other than the taxpayer, the preparer signing this return certifies that  
this declaration is based on all information of which he/she has any knowledge.

DATE: TITLE: TAXPAYER

SIGNED: (TAXPAYER)

ADDRESS: (PREPARER)

PHONE NO.: PREPARER'S I.D. #

DEPUTY PENALTY  
PLEASE SIGN AND DATE YOUR RETURN. SEND THE ORIGINAL TO  
THE COUNTY APPRAISER'S OFFICE BY APRIL 1. UNSIGNED  
RETURNS CANNOT BE ACCEPTED BY THE APPRAISER'S OFFICE.  
NOTICE: IF YOU ARE ENTITLED TO A WIDOW'S, WIDOWERS OR  
DISABILITY EXEMPTION ON PERSONAL PROPERTY (NOT ALREADY  
CLAIMED ON REAL ESTATE) CONSULT APPRAISER.

PAGE 2 TANGIBLE PERSONAL PROPERTY TAX SCHEDULES (ENTER TOTALS ON PAGE 1)

ASSETS PHYSICALLY REMOVED DURING LAST YEAR  
Property fully depreciated but continuing in service must be reported on the schedules below.

RETIRED, SOLD, TRADED, ETC.

555 Copier mod 19 3 92 10,100 15,000 Sold to ABC School

LEASED, LOANED, AND RENTED EQUIPMENT - Please complete if you had equipment belonging to others.

NAME AND ADDRESS OF OWNER OR LESSOR  
Lessor's Name & Mailing Address  
555 Copier 93 93 175 15,000 X

LINE 10 Enter Applicable Line Number (10-24) From Page 1

DESCRIPTION OF ITEM AGE YEAR PURCHASED TAXPAYER'S ESTIMATE OF FAIR MARKET VALUE TAXPAYER'S ESTIMATE OF ORIGINAL INSTALLED COST APPRAISER'S USE ONLY

Office deluxe chair 2 92 90.00 100.00

Computer Desk with file 2 93 200.00 415.00

Telephone - 2 lines 3 92 150.00 250.00

Oak Storage Cabinet 2 93 125.00 150.00

Oak Bookcase 2 93 125.00 139.00

Deluxe Office Chair 2 93 150.00 179.00

LINE 11 Enter Applicable Line Number (10-24) From Page 1

DESCRIPTION OF ITEM AGE YEAR PURCHASED TAXPAYER'S ESTIMATE OF FAIR MARKET VALUE TAXPAYER'S ESTIMATE OF ORIGINAL INSTALLED COST APPRAISER'S USE ONLY

QOO Computer 2 93 1490.00 2500.00

DP Printer 600 2 93 350.00 1000.00

Monitor - 14" 2 93 140.00 400.00

Mouse 2 93 20.00 43.00

LINE 12 Enter Applicable Line Number (10-24) From Page 1

DESCRIPTION OF ITEM AGE YEAR PURCHASED TAXPAYER'S ESTIMATE OF FAIR MARKET VALUE TAXPAYER'S ESTIMATE OF ORIGINAL INSTALLED COST APPRAISER'S USE ONLY

5 - Wooden Tables 3 92 20.00 40.00

3 - Custom made glass racks 3 92 180.00 714.00

12 - Large display racks 3 92 500.00 700.00

2 - Cash Registers 3 92 100.00 300.00

LINE 22 Enter TOTALS on Front - Continue on Separate Sheet if Necessary

LEASE NO. NAME/ADDRESS OF LESSEE ACTUAL PHYSICAL LOCATION DESCRIPTION AGE YEAR PURCHASED RENT PER MONTH TERM TAXPAYER'S ESTIMATE OF FAIR MARKET VALUE TAXPAYER'S ESTIMATE OF ORIGINAL INSTALLED COST

13 - 4030 Lessee's Name Fork Lift 5 90 250 5000 X 8000



Dear Broward Taxpayer:

My goal as Property Appraiser is to make fair, equal, and uniform appraisals for all property owners so no one pays more than his or her fair share.

Our door is always open to you. We welcome the opportunity to discuss your appraisal with you.

The account number printed on your Tangible Personal Property Return includes a letter signifying the Tangible Personal Property Field Representative responsible for your particular area. The area letter is located at the end of the account number.

If you wish to speak to your Tangible Personal Property Field Representative regarding any of your questions or concerns, please contact our TPP Division at 954-357-6836.

**You can also visit our website at  
[www.bcpa.net](http://www.bcpa.net).**

If you have any suggestions for improving our office, please let me know.

Sincerely,

Lori Parrish, CFA  
Broward County Property Appraiser  
[Lori@bcpa.net](mailto:Lori@bcpa.net)

## Personal Property Brochure - Front

### All Business Owners Are Entitled to Claim a \$25,000 Tax Exemption on Tangible Personal Property

Florida voters adopted a constitutional amendment in 2008 granting a \$25,000 tax exemption to business owners for all tangible personal property (TPP).

Under the law, your initial DR-405 TPP tax return also serves as your application for the \$25,000 exemption. You will not owe any TPP taxes if the total TPP value is below \$25,000. Taxes are only owing on the portion of TPP Value above the \$25,000 mark.

If your initial return shows a total TPP value of under \$25,000, you do NOT need to submit TPP tax returns in subsequent years so long as your total TPP value remains below \$25,000. If your total TPP value rises above \$25,000 in any later tax year, you have an affirmative duty to report this to our office -- or risk possible penalties and interest for failing to do so.

A DR-405 tax return is required for each location where an owner of tangible personal property transacts business. A \$25,000 exemption would apply to each return.

If you have TPP questions, please contact us:

**Property Appraiser's Office**  
**115 S. Andrews Avenue, Room 111**  
**Ft. Lauderdale, FL 33301**  
**954-357-6836**  
**[www.bcpa.net](http://www.bcpa.net)**

### HELPFUL HINTS AND SUGGESTIONS

- **Be sure the Property Appraiser's account number appears on the return you file.**
- Please read the instruction sheet included with the return.
- Be sure your return includes the legal name of the entity filing the return and the Doing Business As name (DBA), if different.
- If you use tax preparation software, please include the Property Appraiser's account number on your return.
- Be sure to include your Federal Employer Identification Number (FEIN) or Social Security Number on the return.
- If you are also applying for a non-profit exemption, that application is due on or before March 1.
- **Be sure to sign and date your return and file it with our office as soon as possible before April 1.**
- If you are unable to file your return before April 1, you may file a request for an extension. This request must be filed within a reasonable amount of time before the April 1 due date. You may e-mail your request to [jmckean@bcpa.net](mailto:jmckean@bcpa.net) or fax it to 954-357-6374.
- Please identify any equipment which has been physically removed, and be sure to list the items on Page 2. You should identify the line number to which the item relates in order for your return to balance with your previous filing.
- Your return must be completely filled out. Do not use terms such as "various" or "same as last year."
- By law, your return is strictly confidential when filed with our office. We will zealously protect its confidential status.

**If you have any questions,  
please contact our office.**

**Visit Our Web Site:**  
**<http://www.bcpa.net>**

# TANGIBLE PERSONAL PROPERTY



**Your Responsibilities as a  
Business Owner**

**Lori Parrish, CFA**  
**Broward County Property Appraiser**

## What is “tangible personal property”?

- According to F.S. 192.001, “tangible personal property” means all goods, chattels, and other articles of value capable of personal possession and whose chief value is intrinsic to the article itself.
- Inventory held for resale and household goods for the owner’s personal use are exempt from taxation.
- Real property is not subject to taxation as tangible personal property. Many items such as signs, parking lot bumpers, exterior lighting, alarm systems and leasehold improvements are taxed as personal property.
- The comprehensive guidelines for the assessment of tangible personal property are determined by the Florida Legislature and are enforced by the Florida Department of Revenue.

## What is “residential personal property”?

- If you own residential rental property, items which would normally be household goods if you were living there such as stoves, refrigerators and furniture become taxable tangible personal property which must be reported each year.
- All tangible personal property must be reported, even if it has been fully depreciated or has been “expensed” on your books.

## Who must file a tangible personal property return?

- Any person or entity owning or possessing tangible personal property (see above) located in Florida as of the January 1 must file a tangible property return with the Property Appraiser in the county where the property is physically located.

## Why was I sent a tangible personal property return?

- You either filed a return last year or our office believes you have property which should be reported.

## How can I obtain a tangible personal property return form?

- If you did not receive a tangible personal property return in the mail, please contact our office at 954-357-6836 or [jmckean@bcpa.net](mailto:jmckean@bcpa.net). You can also download a copy of the form from our website.

## What if I was sent more than one tax return?

- You must file a return for each physical location in Broward County where you have tangible personal property.
- You will notice the account numbers are different on each return.
- Even if you have sold the business or no longer have tangible personal property at a particular location, you must return the form with an explanation.

## What if I have no tangible personal property to report?

- Every business owner has some personal property to report, even if it’s only supplies, rented/ leased equipment or fully depreciated/expensed property.

## Should I file if I’m no longer in business?

- If you possessed tangible personal property on January 1 of the tax year, you must file the return.
- In Block 9a and the address correction box, please explain the date you disposed of the assets and the name and address of the current owner of those assets.
- You must sign and date the return and file it with the Property Appraiser’s Office by April 1.

## Must I report tangible personal property belonging to someone else, or which I furnish to another business?

- Yes. Page 2 requires you to list property used in your business which is owned by others. Typical examples are postage meters, telephone systems, copy equipment, etc.

- If you own tangible personal property you lease to others and is typically located in Broward County, you must report this property on Page 1, Line 22.

## Is there a minimum value I do not have to report?

- No. You must report all tangible personal property. However, if your resulting tax is less than \$30, you will not receive a tax bill. However, your first \$25,000 of value is exempt from taxation once you file an initial return.

## What are the deadlines for filing and non-filing penalties?

- Your return must be filed in our office by April 1.
- After April 1, we are required by Florida law to apply a penalty of 5% per month up to a maximum of 25%. There is a 15% penalty for unreported property and a 25% penalty when no return is filed.

## What if I buy or sell an existing business during the year?

- Tangible personal property taxes constitute a lien against the property rather than a personal obligation of the owner.
- If you buy tangible personal property during the year, you should obtain a copy of paid tax bills for the prior year from the seller and make an agreeable pro-ration of the current year’s taxes.
- Most title companies do not search the public records for unpaid tangible personal property taxes.
- You must report the property at your cost rather than the seller’s cost.
- Please furnish our office with any allocation of purchase price documents, including I.R.S. Form 8594 (Allocation of Purchase Price), if the personal property was acquired with other assets.

## What if I do not file a return?

- If a tax return is not timely filed by April 1, we are still required to assess all tangible personal property.
- We will make our best estimate based on similar equipment and assets owned by other similar businesses.

- The assessment will include a 25% penalty for non-filing. It is in your best interest to file a timely return every year.

## What if I don’t agree with the assessed value appearing on my notice of proposed property tax?

- Each year, we send a notice of proposed property tax (TRIM Notice) with your assessment for the year.
- If you have any questions about the value, we encourage you to call our office to discuss your assessment.
- If you have information the appraised value is higher than the market value of your property, we welcome the opportunity to speak with you and review all of the pertinent facts.
- After speaking with us, if you are still not satisfied, you have 25 days from the date of the notice to file a petition with the Broward County Value Adjustment Board. You can contact the Broward County Value Adjustment Board through their website at [www.broward.org/records/cr101500.htm](http://www.broward.org/records/cr101500.htm) or by phone at 954-357-7292.

## IMPORTANT DATES TO REMEMBER

### January 1

- Date of assessment.
- Personal property returns mailed.

### March 2

- Filing deadline for widow, widower and disability applications for tangible mobile home improvements. (You must reside on the property as of January 1 of the tax year to qualify.)
- Non-profit exemption applications are due.

### April 1

- Filing deadline for personal property returns to avoid penalties.

### Mid-August

- Notice of Proposed Taxes (TRIM Notice) mailed.

### September 18

- Deadline to file Value Adjustment Board petition.

### November

- Tax bills sent by the Broward County Revenue Collector.



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Lori Parrish  
Broward County  
Property Appraiser

**IMPORTANT: TANGIBLE PERSONAL PROPERTY TAX RETURN ENCLOSED**

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