



**Invitation to Bid  
RFP # 22-001**

**2022 Broward County Property  
Appraiser Exemption/Classification and Personal  
Property Mailings**

**For Information Contact:**

**Holly Cimino, Director  
Finance, Budget and Tax Roll Management**

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**115 S Andrews Avenue, Room 111  
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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 October ~~11~~ 22, 2021 at 2:00 pm at which time they will all be publicly opened.** All interested parties are invited to attend this opening.

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**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 his 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 #22-001 " and addressed to:

Mila Schwartzreich, 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. 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: 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. Contact with the Director of Finance, Budget, and Tax Roll Management shall be strictly limited to questions requesting clarification of RFP provisions, or regarding the proper form and substance of the Bidder's RFP Response. 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 (1<sup>st</sup>) 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, inserting, 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-hours 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 \_\_\_\_\_
  - E. Other: \_\_\_\_\_
5. What production capabilities does the equipment have?
  - A. Laser Printers \_\_\_\_\_
  - B. Flat Printing Presses \_\_\_\_\_
  - C. Inserters \_\_\_\_\_
  - D. Folders \_\_\_\_\_
  - E. Other: \_\_\_\_\_
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, sorted, and mailed Full-Service to receive the maximum postage discount. Bidder must print IMB on each mailing; however, we do not use the track and confirm service. The BCPA will NCOA the files in December. 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 for a bid to be considered. The 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. Actual quantities shall be used for invoicing purposes.

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

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

Quantity:      Approximately 395,000

Specs:          C 7 PT High Bulk – white (or similar stock)  
                     8 ½ x 11  
                     Black ink one side, Black & Red ink reverse side.

Property Appraiser will provide PDF no later than 12/2/2021. Property Appraiser will provide vendor with 2 text files containing parcel number, name (2 fields), mailing address, property address, and exemption type(s) no later than 12/13/21. Mailing shall be CASS certified, sorted, and mailed full-service to receive maximum postage discount. Vendor is responsible for printing parcel number, the bar code associated with parcel number (3 of 9), owner name (two separate fields), mailing address, address bar code, 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 proofs prior to printing receipts.

**b. Homestead Newsletter**

Quantity: Approximately 400,000

Specs: 8.5 x 11  
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 11/8/21. Vendor must provide a hard copy proof by 11/15/21 for review and approval by BCPA. Vendor will deliver 5,000 newsletters to Property Appraiser no later than 1/3/22.

**c. Homestead Envelopes**

Quantity: Approximately 395,000

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 11/8/21.

**d. Additional Insert**

Quantity: Approximately 25,500

Specs: 1/3 size of 8.5 x 11 sheet of colored paper (light blue)  
Black ink one side

Property Appraiser will provide PDF no later than 12/2/2021.

**e. Mailing Specs**

Vendor will fold and insert homestead receipt and homestead newsletter into #10 custom

window envelope for one of the files. Vendor will fold and insert homestead receipt, additional insert, and homestead newsletter into #10 custom window envelope for the second file. Vendor will deliver homestead mailing to Fort Lauderdale (Oakland Park Blvd) post office in three equal drops on January 3<sup>rd</sup>-5<sup>th</sup>, 2022. 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.

**f. Postage**

Bid shall be exclusive of postage costs. BCPA permit #1043 shall be used.

**C 02. SENIOR HOMESTEAD RENEWALS**

**a. Senior Renewal Receipt:**

Quantity: Approximately 27,500

Specs: The Renewal Receipt consists of two attached (double) post cards. Card paper shall be 110# Buff 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 at 4" allowing for separation of each postcard fold.

Property Appraiser will provide vendor with Renewal Receipt in a PDF no later than 1/21/2022. Property Appraiser will provide vendor with data file containing data to be included on receipts no later than 1/21/2022. Vendor must supply Property Appraiser proofs for review and approval prior to printing renewals. Mailing shall be CASS certified, sorted, and mailed full-service to receive maximum postage discount. Vendor is responsible for printing parcel number, the bar code associated with parcel number, name (2 fields), mailing address, address bar code, and property address 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 1/28/2022. 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. BCPA permit #1043 shall be used.

**C 03. NEW SENIOR MAILING**

**a. Sworn Statement**

Quantity: Approximately 5,500

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

Property Appraiser will provide PDF no later than 1/21/22. Property Appraiser will provide vendor with data file containing parcel number, name 1, name 2, mailing address, and property (situs) address no later than 1/21/22. Vendor must include this information as well as the bar code associated with the parcel number on the sworn statement. Mailing shall be CASS certified, sorted, and mailed full-service to receive maximum postage discount. Vendor must supply Property Appraiser proofs prior to printing Sworn Statements.

**b. #10 Window Envelope**

Quantity: Approximately 5,500

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 11/8/21.

**c. #9 Envelope**

Quantity: Approximately 5,500

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 11/8/21.

**d. New Senior Letter**

Quantity: Approximately 5,500

Specs: 20# Bond White  
8 ½ x 11

1/0 Black ink one side

Property Appraiser will provide PDF no later than 1/21/22. Vendor is responsible for folding letter to fit #10 envelope.

**e. Mailing**

Vendor must insert Sworn Statement, new senior letter, and #9 envelope into #10 window envelope. Vendor will deliver new senior mailing to post office no later than 1/28/2022. 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. BCPA permit #1043 shall be used.

**C 04. PERSONAL PROPERTY**

**a. Personal Property Brochure**

Quantity: Approximately 22,500

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 12/2/21. Vendor must supply Property Appraiser a proof for review and approval prior to printing brochures. Vendor is to deliver 5,000 Personal Property brochures to Property Appraiser no later than 1/3/2022.

**b. Personal Property Envelopes**

**1. #10 Custom Double Window**

Quantity: 17,500  
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)

Property Appraiser will provide vendor with PDF no later than 11/8/21.

2. # 9 plain envelope

a) Quantity: 17,500

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)

Property Appraiser will provide vendor with PDF no later than 11/8/21.

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

Quantity: 17,500

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 12/2/21. Property Appraiser will provide vendor with data file containing data to be included on returns no later than 12/13/21. Mailing shall be CASS certified, sorted, and mailed full-service to receive maximum postage discount. Vendor is responsible for printing account number, bar code associated with the account number, name (2 fields), address, address bar code, property 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. Vendor must supply Property Appraiser proofs for review and approval prior to printing returns.

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

Quantity: 17,500

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 12/2/21. Vendor must supply Property Appraiser proofs for review and approval prior to printing instruction sheets. Personal Property instruction sheets are to be folded to fit #10 window envelopes. Vendor will insert personal property brochure, instruction sheet, Personal Property return, and #9 envelope into #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 1/10/22. Vendor must submit proof of mailing (postal receipts) to BCPA within three days of mailing.

**e. Postage**

Bid shall be exclusive of postage costs. BCPA permit #1043 shall be used.

**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 at 4" allowing for separation of each postcard fold.

Property Appraiser will provide vendor with DR-498 in a PDF no later than 12/2/21. Property Appraiser will provide vendor with data file containing data to be included on returns no later than 12/13/21. Vendor must supply Property Appraiser proofs for review and approval prior to printing renewals. Mailing shall be CASS certified, sorted, and mailed full-service to receive maximum postage discount. Vendor is responsible for printing parcel number, the bar code associated with parcel number, name (2 fields), mailing address, address bar code, legal description, property (situs) address, 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 1/10/22. 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. BCPA permit #1043 shall be used.

**C 06. Agricultural Renewal**

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

Quantity: 1,300

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 at 4" allowing for separation of each postcard fold.

Property Appraiser will provide vendor with DR-499 in a PDF no later than 12/2/21. Property Appraiser will provide vendor with data file containing data to be included on returns no later than 12/13/21. Vendor must supply Property Appraiser proofs for review and approval prior to printing renewals. Mailing shall be CASS certified, sorted, and mailed full-service to receive maximum postage discount. Vendor is responsible for printing parcel number, the bar code associated with parcel number, name (2 fields), mailing address, address bar code, legal description, property (situated) address, and ag 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 1/10/22. 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. BCPA permit #1043 shall be used.

**C 07. TPP Postcard**

**a. TPP Postcard**

Quantity: Approximately 54,000

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 12/2/21. Property Appraiser will provide vendor with data file containing data to be included on postcards no later than 12/13/21. Vendor is responsible for printing account number, name (2 fields) and mailing address on one side of card. Vendor must supply Property Appraiser proofs for review and approval prior to printing postcards. Mailing shall be CASS certified, sorted, and mailed full-service to receive maximum postage discount. Vendor is responsible for delivering them to Post Office no later than 1/10/22. 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. BCPA permit #1043 shall be used.

SECTION D: BID SIGNATURE FORM

Firm Name	Mailing Address
Telephone Number	City, State, Zip

**D 01. HOMESTEAD RENEWAL**

	Unit Price	Extended Price
Printing 395,000 Homestead Receipts	<hr/>	<hr/>
Printing 400,000 Newsletters	<hr/>	<hr/>
Printing 395,000 #10 Window Envelopes	<hr/>	<hr/>
Printing 25,500 Additional Inserts	<hr/>	<hr/>
Folding, Inserting & Mailing 25,500 Homestead Receipts, Additional Insert, and Newsletters	<hr/>	<hr/>
Folding, Inserting & Mailing 369,500 Homestead Receipts and Newsletters	<hr/>	<hr/>
Folding 5,000 Newsletters	<hr/>	<hr/>
<b>TOTAL</b>		<hr/>

**D 02. SENIOR HOMESTEAD RENEWALS**

	Unit Price	Extended Price
Printing 27,500 Senior Renewal Receipts	<hr/>	<hr/>
Folding, Tabbing & Mailing 27,500 Senior Renewal Receipts	<hr/>	<hr/>

**TOTAL**

**D 03. NEW SENIOR MAILING**

	Unit Price	Extended Price
Printing 5,500 Senior Sworn Statements		
Printing 5,500 New Senior Letters		
Printing 5,500 #10 Window Envelopes		
Printing 5,500 #9 Business Reply Envelopes		
Folding, Inserting & Mailing 5,500 Senior Sworn Statements, #9 BRE, and Letter		

**TOTAL**

**D 04. PERSONAL PROPERTY MAILING**

	Unit Price	Extended Price
Printing 22,500 Personal Property Brochures		
Printing 17,500 TPP #10 Double Window Envelope		
Printing 17,500 TPP #9 Business Reply Envelopes		
Printing 17,500 Personal Property Returns (DR-405)		

Printing 17,500 Personal Property Instructions (DR-405I)	_____	_____
--	-------	-------

Folding, Inserting & Mailing 17,500 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 1,300 Renewal Cards (DR-499)	_____	_____
---------------------------------------	-------	-------

Folding, Tabbing & Mailing 1,300 Renewal Cards	_____	_____
--	-------	-------

<b>TOTAL</b>		_____
--------------	--	-------

**D 07. TPP Postcard Mailing**

Unit Price	Extended Price
------------	----------------

Printing 54,000 Postcards	_____	_____
---------------------------	-------	-------

Mailing 54,000 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 # 22-001.

*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 workplace 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 workplace;
  - (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 workplace 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 workplace 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 a 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 workplace as to indicate that such person or entity has failed to make a good faith effort to provide a drug free workplace.



**DRUG FREE WORKPLACE CERTIFICATION**

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

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

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

Sworn to and subscribed before me this \_\_\_\_\_ day of \_\_\_\_\_, 2021,

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 \_\_\_\_\_, 2021,

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 2021 BCPA exemption/classification and personal property mailings. The BCPA will provide updated pdf files for each item for the 2022 mailings.



115 South Andrews Avenue  
Room 111  
Fort Lauderdale, Florida 33301

Homestead Renewal Envelope

**RETURN SERVICE REQUESTED**

PRESORTED  
FIRST-CLASS MAIL  
U.S. POSTAGE  
**PAID**  
Marty Kiar  
Broward County  
Property Appraiser

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



115 South Andrews Avenue  
Room 111  
Fort Lauderdale, Florida 33301

Senior #10 Window Envelope

PRESORTED  
FIRST-CLASS MAIL  
U.S. POSTAGE  
**PAID**  
Marty Kiar  
Broward County  
Property Appraiser

**SENIOR HOMESTEAD  
APPLICATION ENCLOSED:**

**TIMELY ACTION REQUIRED**

## #9 Senior Envelope

IMPORTANT: DO NOT ENLARGE, REDUCE OR MOVE the FIM and POSTNET barcodes. They are only valid as printed!  
Special care must be taken to ensure FIM and POSTNET barcode are actual size AND placed properly on the mail piece  
to meet both USPS regulations and automation compatibility standards.

**FROM**

---

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



**ATTN: SENIOR EXEMPTIONS**



Postage  
Required  
Post Office will  
not deliver  
without proper  
postage

Artwork for Envelope, Business, #9, 3 7/8 x 8 7/8 in (3.875" x 8.875")  
Layout: CRM with IMB.lyt  
November 19, 2010

Produced by DAZzle Designer, Version 9.0.05  
(c) 1993-2009, Endicia, [www.Endicia.com](http://www.Endicia.com)  
U.S. Postal Service, Serial #

TPP #10 Double Window Envelope

PRESORTED  
FIRST-CLASS MAIL  
U.S. POSTAGE  
**PAID**  
Marty Kiar  
Broward County  
Property Appraiser

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

**CONFIDENTIAL**



## #9 TPP Envelope

IMPORTANT: DO NOT ENLARGE, REDUCE OR MOVE the FIM and POSTNET barcodes. They are only valid as printed!  
Special care must be taken to ensure FIM and POSTNET barcode are actual size AND placed properly on the mail piece to meet both USPS regulations and automation compatibility standards.

**FROM**


\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



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



Postage  
Required  
Post Office will  
not deliver  
without proper  
postage

Artwork for Envelope, Business, #9, 3 7/8 x 8 7/8 in (3.875" x 8.875")  
Layout: CRM with IMB.lyt  
November 19, 2010

Produced by DAZzle Designer, Version 9.0.05  
(c) 1993-2009, Endicia, [www.Endicia.com](http://www.Endicia.com)  
U.S. Postal Service, Serial #

## Dear Homeowners:

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

First: We ONLY printed the name(s) below of those individuals 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 EXEMPTION AT THIS PROPERTY.** If you are a co-owner, surviving spouse, or trust beneficiary residing on the property and are not listed below, you should visit our website at [web.bcpa.net](http://web.bcpa.net) to file online for Homestead. If you believe our information is incorrect or if you have any questions, please contact us at [kcardone@bcpa.net](mailto:kcardone@bcpa.net), or 954.357.6830, or visit our office.

Second: The Homestead Exemption of anyone named below will be **AUTOMATICALLY RENEWED** for 2021 provided there was no change in the ownership or eligible use of the property. By law, you **MUST** notify us if any portion of the property has been rented, or if a Homesteaded owner listed below died or moved, or if you are claiming a Homestead (or other residency-based) Exemption on any other property, etc. Please use the card on the back of this form to notify us of any changes.

Third: If you recently moved to this property, the exemption from your previous residence does NOT automatically transfer to your new home. If this applies to you, then you must apply for a new exemption. If you received this card at your home address, but the name printed below is the former owner, you must apply for a new exemption in your own name to receive tax savings.

Finally, the renewal application card for the Low-Income Senior's Exemption will be mailed in early February. Please contact us at 954.357.6830 if you had this exemption last year but do not receive a renewal notice by February 26, 2021.

Sincerely,



Marty Kiar  
Broward County Property Appraiser  
[martykiar@bcpa.net](mailto:martykiar@bcpa.net)

Property Address:  
7331 NW 13 CT

Parcel ID#:  
494134-25-0200

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

**PARCEL ID#:**  
494134-25-0200



**HOMESTEAD OWNER(S):**

>>



25-1

DOMINGUEZ, ANA  
VALAREZO, ANGEL  
7400 STIRLING RD APT 1312  
HOLLYWOOD FL 33024-1545



### MAIL TO:

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

or **FAX TO:** 954.357.6188

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

## MAILING ADDRESS CHANGES

If your mailing address is incorrect or if the name of an owner is misspelled, please notify our Data Entry Section by mail, or email at [address@bcpa.net](mailto:address@bcpa.net), or fax to 954.357.6894 in order for us to keep our records up to date. Be sure to let us know if your mailing address changes in the future.

## DEATH OF THE HOMESTEAD RECIPIENT

If anyone named on this Homestead Exemption renewal receipt has died, please notify our office to avoid potential penalties. The Homestead Exemption claimed by a deceased person must be removed for the year immediately following the death of the exemption recipient. Homestead Exemption does not transfer to family members and does not remain with the property after a Homesteaded owner dies. If you are a surviving spouse or otherwise believe you are entitled to an exemption, you must file your own application to receive the benefit. Failure to report the death of a Homesteaded owner or Homesteaded trust beneficiary can result in a costly back tax lien, plus penalties and interest. Contact us at 954.357.6830 if you have any questions.

## LOW-INCOME SENIOR EXEMPTION

If you received the Low-Income Senior Exemption for tax year 2020, it will not be listed among your 2021 exemptions on the attached renewal card. Florida law requires you to renew your Senior Exemption annually. Your 2021 renewal application card for the Low-Income Senior Exemption will be mailed in early February. You must sign and return the senior renewal card by September 20, 2021 in order to renew your Low-Income Senior Exemption for tax year 2021.

If you did not receive the Low-Income Senior Exemption for tax year 2020 and are eligible for tax year 2021, you must file an application by September 20, 2021. Please visit our website at [web.bcpa.net](http://web.bcpa.net) and click on the Senior Exemption link or contact our Customer Service Department at 954-357-6830 for additional information.

Please cut along dotted line and mail in an envelope to our office

### OFFICIAL RECORDS CHANGE ORDER - 2021

**PARCEL #: 494134-25-0200**

**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 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.

- ☐ Homesteaded resident no longer maintains permanent residency at the subject property as of January 1, 2021. Date moved: \_\_\_\_\_  
 (Please provide new mailing address.)
- ☐ Homesteaded resident died. Name of deceased: \_\_\_\_\_ Date of death: \_\_\_\_\_ (Please enclose copy of death certificate.)
- ☐ Check this box if ANY portion of this property was rented out as of January 1, 2021. 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.
- ☐ Homesteaded resident/spouse is Active Duty US Military (please provide documentation).
- ☐ Homesteaded co-owners are now divorced and ex-spouse \_\_\_\_\_ no longer permanently resides at this property.
- ☐ I demolished the subject residence with the intent to rebuild a new permanent residence on the property. Date of demolition: \_\_\_\_\_
- ☐ I and/or my spouse are claiming the benefits of a permanent residency based property tax exemption or tax credit on another property elsewhere. (Examples: Homestead Exemption, NY STAR, Veteran's Exemption, Senior/Disability Exemption, etc.) Property address: \_\_\_\_\_

If you checked any of the above boxes, please sign below and return this card to us by March 1, 2021.

**If you did NOT check any boxes above, DO NOT RETURN THIS CARD as your exemptions will be automatically renewed without further action.** Thank you.

Date: \_\_\_\_\_ Signature: \_\_\_\_\_ 34

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

# BCPA NEWSLETTER

To view this newsletter in **Creole** or **Spanish**, please visit our website at [web.bcpa.net](http://web.bcpa.net), click on **Resources** from the navigation menu, and select **eNews**.



## A message from Marty Kiar

As your Broward County Property Appraiser, it is my honor to serve you and the almost 2 million residents who call Broward County home. I am so pleased Florida voters approved Amendments 5 and 6 to the Florida Constitution during the November 2020 election. Amendment 5 extends the time frame within which portability benefits can be transferred from two to three tax years. Amendment 6 extends the property tax exemption of combat-wounded disabled veterans to his/her surviving spouse. Details about these changes in the law can be found in the next section. If you have any questions, please visit our website at [web.bcpa.net](http://web.bcpa.net) or contact our office at (954) 357-6830.

**GREAT NEWS!**

## New Constitutional Amendments Affecting Your Property Taxes

### Portability

**Beginning January 1, 2021, Florida law extends the timeframe within which to transfer portability benefits from two to three tax years.**

#### What does that mean?

Portability allows eligible Homesteaded property owners to pay less in property taxes on their new home by moving their "Save Our Homes" (SOH) savings (up to \$500,000) from one Florida property to another Florida property when establishing Homestead Exemption on the new property. Beginning January 1, 2021, property owners now have three tax years to use any Portability. To be eligible to move this SOH benefit, the new property must receive Homestead Exemption within three tax years – not calendar years – of the "abandonment" of the Homestead Exemption at the previous property.

Note: Homestead Exemption and Portability do not automatically transfer. You must apply for Homestead Exemption on the new property and also submit a Portability application. Portability does not require you to sell your previous home, but merely for you to no longer receive the Homestead Exemption on it.

Additional information about Portability and a Portability estimator can be found on our website at [web.bcpa.net](http://web.bcpa.net).

### Combat-Wounded Disabled Veteran's Exemption

**Beginning January 1, 2021, Florida law extends the Combat-Wounded Disabled Veteran's Exemption to surviving spouses.**

The homestead property tax exemption granted to combat-wounded disabled veterans, age 65 or older, can now be extended to the veteran's surviving spouse. Prior to January 1, 2021, combat-disabled veterans 65 years of age or older were eligible to receive a property tax discount equal to their combat-related disability rating percentage on the veteran's homesteaded property. However, this discount expired upon the veteran's death and was not extended to his/her spouse. As a result of this change in Florida law, a veteran's surviving spouse will continue to receive the exemption on his/her homesteaded property until the spouse remarries, sells, or otherwise disposes of the property. Under this measure, if the spouse sells the property and does not remarry, the spouse may file for and receive the discount on a new homestead property so long as the exemption amount does not exceed the dollar amount from the most recent ad valorem tax roll at his/her previous homestead residence.

# BCPA GOES GREEN

## File Exemptions Online

Over the last few years, BCPA has been working on innovative ways to “Go Green” in our office. Going green not only helps the environment but benefits Broward County property owners by saving time – something we can all use more of. Applying for exemptions has never been easier and can be done in the comfort of your own home. **You can easily apply online at [web.bcpa.net](http://web.bcpa.net) for Homestead Exemption, Portability, and the Low-Income Senior Exemption.**

## Virtual Visits

If you prefer face-to-face communication, you can now meet with one of our Mobile Exemption Information Team members virtually. There is no need to drive to us when we can come to you virtually.



To schedule a virtual appointment, please call 954-357-5579 or email [ExemptionExpress@bcpa.net](mailto:ExemptionExpress@bcpa.net)

## Coming Soon

As we continue to expand our efforts to go green and reduce waste, BCPA is working to help Broward County business owners by developing online Tangible Personal Property tax return filing and extension requests. We are also excited to introduce an email notification system to let you know if any changes have been made to your property's ownership. We look forward to implementing these features in the coming months.

## Annual Senior Exemption Renewal

**RENEWAL APPLICATION FOR ADDITIONAL EXEMPTION FOR PERSONS AGE 65 AND OVER - TAX YEAR 2021** (FORM PA 801-12)

**THIS RENEWAL APPLICATION MUST BE RETURNED (POSTMARKED) TO THE PROPERTY APPRAISER NO LATER THAN MAY 3, 2021.**

I hereby certify that I am at least 65 years of age as of January 1, 2021, and the total prior year (2020) adjusted gross income for all persons living in my household on January 1, 2021, does not exceed \$40,000. 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.

☐ Check this box if you have maintained permanent residence on this property for at least 25 years.

DATE \_\_\_\_\_ PHONE \_\_\_\_\_

SIGNATURE OF APPLICANT(S) \_\_\_\_\_

Sample image

If you received a Senior Exemption in 2020, it will not be listed on the enclosed Homestead Exemption renewal receipt. Unlike Homestead, there is no automatic renewal for a Senior Exemption. Florida law requires you to renew your Senior Exemption annually. Your 2021 Senior Exemption renewal card will be mailed to you in early February. **You must sign and return your renewal card to us by September 20, 2021 in order to renew the Senior Exemption for the 2021 tax year.** The signed copy of your senior renewal card can be emailed to [Homestead@bcpa.net](mailto:Homestead@bcpa.net), faxed to 954-357-6188, or mailed to our office.

**-OR-**

**You can now renew your Senior Exemption online or by visiting our website at [web.bcpa.net/renew](http://web.bcpa.net/renew)**

**GREAT NEWS!**

Broward County Property Appraiser's Office  
115 South Andrews Avenue - Room 111  
Fort Lauderdale, FL 33301

Telephone: 954-357-6830  
Fax: 954-357-6188  
Website: [web.bcpa.net](http://web.bcpa.net)

Follow us on social media  
[@martykiarbcpa](https://www.instagram.com/martykiarbcpa)



**ADJUSTED GROSS HOUSEHOLD INCOME  
SWORN STATEMENT AND RETURN**

Senior Citizen Exemption for Persons Age 65 and Over  
Section 196.075, Florida Statutes

Application year 2021

This statement must be filed each year with the property appraiser by March 1.

☒ Initial ☐ Renewal\*



Parcel ID #: 494130-GB-0240  
Property Address: 10402 SUNRISE LAKES BLVD #212

494130-GB-0240  
SHAPIRO, FLORENCE M  
H & FLORENCE SHAPIRO REV LIV TR  
95 HARTWELL AVE  
LITTLETON MA 01460-1261



**PART 1** List all persons living in the homestead on January 1 the year of exemption.

Do not include  
renters or boarders

Name of Household Member	Date of Birth	Filed IRS return?		Adjusted Gross Income
		Yes	No	
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	
Total adjusted gross income for all household members				

For each household member, submit the documents required by either **PART 2** or **PART 3** for last year's income.

\*If you are renewing your exemption, you do not need to submit documents, unless the property appraiser asks. Contact your property appraiser's office for instructions.

**PART 2** For each member who files an IRS Form 1040 series (checked "Yes" in PART 1), submit:

- IRS 1040 series form or an Application for Automatic Extension of Time to File U.S. Individual Income Tax Return (Form 4868), if applicable, and
- Wage and Tax Statements (W-2 Forms).

**PART 3** For each member who does not file an IRS Form 1040 series (checked "No" in PART 1), submit:

- A copy of the prior year's Social Security Statement (SSA 1099), if applicable, and
- A Statement of Income from page 2 of this form.

For prompt consideration, submit supporting documents by **May 1**. No further documentation will be accepted after **June 1**.  
If additional documents are required, the property appraiser will ask for them.

**CERTIFICATION**

I certify that:

- I am at least 65 years old on January 1 of the tax year I am applying for. I have attached proof of my age.
- The total prior year adjusted gross income of all persons living in the household on January 1 of the tax year is not more than the adjusted gross income in section 62 of the US Internal Revenue Code.

Contact your county property appraiser for the maximum household adjusted gross income, which may change each year.

I qualify for this exemption under Florida law. I am a permanent resident of the State of Florida and I own and occupy the property above. Under s. 196.131(2), F.S., any person who knowingly and willfully gives false information to claim homestead exemption is guilty of a misdemeanor of the first degree, punishable by a term of imprisonment up to 1 year or a fine up to \$5,000 or both. Under penalties of perjury, I declare that I have read this application and Statement of Adjusted Gross Income and the facts in it are true.

Signature, applicant

Print name

Email

Phone number

Date

## INSTRUCTIONS

This exemption applies only to the property taxes of the taxing authority granting the exemption. To qualify for an additional homestead exemption under s. 196.075, F.S. for persons age 65 years or older, the household income of all persons living in the home cannot be more than the household adjusted gross income defined below.

As used on this application, the term:

“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.

“Household income” means the adjusted gross income in s. 62 of the US Internal Revenue Code, of all members of a household. (This is the “Adjusted Gross Income” amount reported on IRS Form 1040.)

Definitions: Section 196.075, Florida Statutes

Examples of Supporting Documentation for the Property Appraiser			
IRS Returns	Income Statements	Earning Statements	
Form 1040 Form 1040A Form 1040EZ	Social security benefits Pension Interest or annuities Rental receipts	W-2 forms RRB 1042S SSA 1042S Partnership income (1065)	Form 1099 Form 1099A RRB 1099 SSA 1099

For prompt consideration, submit income documentation before May 1 for all household members.

No documentation can be accepted after **June 1**.

Supporting documentation will be destroyed after use unless you ask the property appraiser to return the documents.

Complete this form for each member whose income is below the filing thresholds for the IRS and who has not filed an IRS Form 1040 series. See page 1, PART 3. Do not complete for minor children with no income.

STATEMENT OF INCOME			
Name			
Earned income		Social Security benefits**	
Investment income		Veterans Administration benefits	
Capital gains or (losses)		Income from retirement plans	
Interest income		Income from pensions	
Rents		Income from trust funds	
Royalties		Other*** (specify):	
Dividends			
Annuities			
Total income for this household member			
Enter this amount in PART 1 and submit with page 1 of Form PA-501SC for each member.			

### \*\*Social Security Benefits - Internal Revenue Service (IRS) Information

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

If your combined benefits and other income exceed certain thresholds, some part of your Social Security income may be taxable. Include the taxable amount on this line. Consult the IRS for Social Security income that may be taxable based on current formulas.

### \*\*\*Other income

If you receive any other income, fill in the source and the amount. Do not include income that would not be included in adjusted gross income, such as child support.



Broward County Property Appraiser's Office  
115 S. Andrews Avenue, Room 111  
Fort Lauderdale, Florida 33301  
954.357.6830 Fax: 954.357.8474  
web.bcpa.net

Dear Senior Homeowner(s):

Many Florida senior citizens are eligible to claim the **Low-Income Senior's Additional Homestead Exemption** which provides additional property tax savings. This exemption applies only to the County's portion of the taxes plus the city portion of taxes for residents of the 30 Broward cities which adopted the exemption.

To qualify for the Senior Exemption, at least one homesteaded owner must be age **65 or older as of January 1, 2021** and the **combined adjusted gross income of your household for 2020 must not exceed \$31,100**. If you believe you will qualify for this valuable exemption, please follow these steps:

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

1. Complete Part (1) of the enclosed Sworn Statement of Adjusted Gross Income of Household.
2. Complete the Certification section of the Sworn Statement of Adjusted Gross Income of Household (located at the bottom of page 1).
3. Submit the Sworn Statement of Adjusted Gross Income of Household to our office on or before the **MARCH 1, 2021 DEADLINE**.
4. Submit copies of your 2020 Income Tax Return Form 1040 for all persons residing in your home (excluding renters/boarders) to our office **no later than JUNE 1, 2021**.

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

1. Complete Parts (1) and (3) including the statement of income located on page 2 of the enclosed Sworn Statement of Adjusted Gross Income of Household.
2. Complete the Certification section of the Sworn Statement of Adjusted Gross Income of Household (located at the bottom of page 1).
3. Submit the Sworn Statement of Adjusted Gross Income of Household to our office on or before the **MARCH 1, 2021 DEADLINE**.
4. Submit a copy of your 2020 Social Security Statement (SSA-1099) to our office by **JUNE 1, 2021**. (Note: The Social Security Administration will mail the SSA-1099 Form to you by February 1.)

If you prefer to file a new Low-Income Senior Exemption application electronically, you can complete the application online at <https://web.bcpa.net/Senior>. You will need to upload the required documentation.

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

Sincerely,

A handwritten signature in black ink that reads "Marty Kiari".

MARTY KIAR  
Broward County Property Appraiser  
[martykiar@bcpa.net](mailto:martykiar@bcpa.net)  
[www.facebook.com/MARTYKIARBCPA](https://www.facebook.com/MARTYKIARBCPA)  
[www.twitter.com/MARTYKIARBCPA](https://www.twitter.com/MARTYKIARBCPA)





Marty Kiar  
Broward County Property Appraiser  
115 S. Andrews Ave. Room 111  
Fort Lauderdale, FL 33301-1801



Account # C00001101120-B

Mill 0312 Use 524210 2020 Assmnt 694,996

# TANGIBLE PERSONAL PROPERTY TAX RETURN

CONFIDENTIAL

DR-405, R. 01/18  
Rule 12D-16.002, F.A.C.  
Eff. 01/18

Return to property appraiser by **April 1** to avoid penalty.

Broward County

Tax year 2021

Business name (DBA-Doing Business As) and mailing address:

Property Location:  
1201 NW 62 ST 130VARIOUS FORT LAUDERDALE  
FORT LAUDERDALE



1  
24

BROWN & BROWN INC  
TAX DEPT  
PO BOX 2412  
DAYTONA BEACH FL 32115-2412



Federal Employer  
Identification Number

-

NAICS

**\*\*New for 2021: A request for an extension can now be filed via our website at [web.bcpa.net](http://web.bcpa.net). Requests must be submitted prior to April 1, 2021\*\***

If name and address is incorrect, please make needed corrections.

1. Owner or person in charge _____ Phone _____ Business/corporate name	6. Type or nature of your business _____ Trade levels (check all that apply) <input type="checkbox"/> Retail <input type="checkbox"/> Wholesale <input type="checkbox"/> Manufacturing <input type="checkbox"/> Professional <input type="checkbox"/> Service <input type="checkbox"/> Agricultural <input type="checkbox"/> Leasing/rental <input type="checkbox"/> Other, specify: _____
2. Physical location (no PO Boxes)	7. Did you file a TPP return in this county last year? <input type="checkbox"/> Yes <input type="checkbox"/> No Name and location
3. Do you file a TPP tax return under any other name? <input type="checkbox"/> Yes <input type="checkbox"/> No Name on most recent return or tax bill	8. Former owner of business
4. Date you began business in this county	9. If sold, to whom? _____ Date sold _____
5. Fiscal year end date _____ If before 12/31 last year, does this return reflect additions/deletions through Dec 31? <input type="checkbox"/> Yes <input type="checkbox"/> No	

**Personal Property Summary Schedule** - Enter totals from page 2 or from an attached itemized list or depreciation schedule with original cost and date of acquisition.

Taxpayer's Estimate of Fair Market Value	Original Installed Cost	For Property Appraiser Use Only
10 Office furniture, office machines, and library		
11 EDP equipment, computers, and word processors		
12 Store, bar and lounge, and restaurant furniture, equipment, etc.		
13 Machinery and manufacturing equipment		
14 Farm, grove, and dairy equipment		
15 Professional, medical, dental, and laboratory equipment		
16 Hotel, motel, and apartment complex		
16a Rental units (stove, refrigerator, furniture, drapes, and appliances)		
17 Mobile home attachments (carport, utility building, cabana, porch, etc.)		
18 Service station and bulk plant equipment (underground tanks, lifts, tools)		
19 Signs (billboard, pole, wall, portable, directional, etc.)		
20 Leasehold improvements - grouped by type, year of installation, and description		
21 Pollution control equipment		
22 Equipment owned by you but rented, leased or held by others		
23 Supplies not held for resale		
24 Renewable energy source devices		
25 Other, specify:		
<b>TOTAL PERSONAL PROPERTY</b>		

I declare I have read this tax return and the accompanying schedules and statements. The facts 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 he or she has knowledge of.

Signature taxpayer	Print name	Title	Date
Signature preparer	Print name	Preparer ID	Date
Address		Phone	

<input type="checkbox"/> \$25,000	Less	
<input type="checkbox"/> Widowed	Exemptions	
<input type="checkbox"/> Blind	Taxable	
<input type="checkbox"/> Total disability	Value	
<input type="checkbox"/> Other, specify	Penalties	
Signature, deputy		Date

**Sign and date** your return, send the **original** to the county property appraiser's office by **April 1**. Unsigned returns **cannot** be accepted by the appraiser's office. If you are entitled to a widow's, ~~40~~ower's, or disability exemption on personal property (not already claimed on real estate), consult your appraiser.

## DR-405, R. 01/18, Page 2

ASSETS PHYSICALLY REMOVED DURING THE LAST YEAR												
Description			Age	Year Acquired	Taxpayer's Estimate of Fair Market Value		Original Installed Cost		Disposed, sold, or traded and to whom?			
LEASED, LOANED, OR RENTED EQUIPMENT				Complete if you hold equipment belonging to others.						Lease Purchase Option Yes No		
Name and Address of Owner or Lessor			Description			Year Acquired	Year of Manufacture	Monthly Rent	Original Installed Cost			
										<input type="checkbox"/> <input type="checkbox"/>		
										<input type="checkbox"/> <input type="checkbox"/>		
										<input type="checkbox"/> <input type="checkbox"/>		
SCHEDULE FOR LINE 22, PAGE 1			Equipment owned by you but rented, leased, or held by others. Enter total on page 1.									
Lease Number	Name/address of lessee Actual physical location		Description	Age	Year Acquired	Monthly Rent	Term	Taxpayer's Estimate of Fair Market Value	Cond*	Original Installed Cost New		
SCHEDULES FOR PAGE 1, LINES 10 - 21 and 23 - 25											APPRAISER'S USE ONLY	
<input type="text"/>	Enter line number from page 1. Description		Age	Year Acquired	Taxpayer's Estimate of Fair Market Value	Cond*	Original Installed Cost	Cond*		Value		
Enter totals on page 1.			TOTAL			TOTAL		TOTAL				
<input type="text"/>	Enter line number from page 1. Description		Age	Year Acquired	Taxpayer's Estimate of Fair Market Value	Cond*	Original Installed Cost	Cond*		Value		
Enter totals on page 1.			TOTAL			TOTAL		TOTAL				
<input type="text"/>	Enter line number from page 1. Description		Age	Year Acquired	Taxpayer's Estimate of Fair Market Value	Cond*	Original Installed Cost	Cond*		Value		
Enter totals on page 1.			TOTAL			TOTAL		TOTAL				

## INSTRUCTIONS

Complete this form if you own property used for commercial purposes that is not included in the assessed value of your business' real property. This may include office furniture, computers, tools, supplies, machines, and leasehold improvements. Return this to your property appraiser's office by April 1. Keep a copy for your records.

Report your summary totals on page 1. Use page 2 or an attached, itemized list with original cost and date acquired for each item to provide the details for each category. Contact your local property appraiser if you have questions.

If you ask, the property appraiser will give you an extension for 30 days and may grant an additional 15 days. You must ask for the extension in time for the property appraiser to consider the request and act on it before April 1.

Each return is eligible for an exemption up to \$25,000. By filing a DR-405 on time you automatically apply for the exemption. If you do not file on time, Florida Law provides for the loss of the \$25,000 exemption.



### WHAT TO REPORT

#### Include on your return:

1. Tangible Personal Property. Goods, chattels, and other articles of value (except certain vehicles) that can be manually possessed and whose chief value is intrinsic to the article itself.
2. Inventory held for lease. *Examples:* equipment, furniture, or fixtures after their first lease or rental.
3. Equipment on some vehicles. *Examples:* power cranes, air compressors, and other equipment used primarily as a tool rather than a hauling vehicle.
4. Property personally owned, but used in the business.
5. Fully depreciated items, whether written off or not. Report at original installed cost.

#### Do not include:

1. Intangible Personal Property. *Examples:* money, all evidences of debt owed to the taxpayer, all evidence of ownership in a corporation.
2. Household Goods. *Examples:* 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. Most automobiles, trucks, and other licensed vehicles. See 3 above.
4. Inventory that is for sale as part of your business. Items commonly referred to as goods, wares, and merchandise that are held for sale. Also, inventory is construction and agricultural equipment weighing 1,000 pounds or more that is returned to a dealership under a rent-to-purchase option and held for sale to customers in the ordinary course of business. See section 192.001(11)(c), Florida Statutes.

### LOCATION OF PERSONAL PROPERTY

Report all property located in this county on January 1. You must file a single return for each site in the county where you transact business. If you have freestanding property at multiple sites other than where you transact business, file a separate, but single, return for all such property located in the county.

Examples of freestanding property at multiple sites include vending and amusement machines, LP/propane tanks, utility and cable company property, billboards, leased equipment, and similar property not customarily located in the offices, stores, or plants of the owner, but is placed throughout the county.

### PENALTIES

**Failure to file** - 25% of the total tax levied against the property for each year that no return is filed

**Filing late** - 5% of the total tax levied against the property covered by that return for each year, each month, and part of a month, that a return is late, but not more than 25% of the total tax

**Unlisted property** - 15% of the tax attributable to the omitted property

### RELATED FLORIDA TAX LAWS

§192.042, F.S. - Assessment date: Jan 1  
 §193.052, F.S. - Filing requirement  
 §193.062, F.S. - Filing date: April 1  
 §193.063, F.S. - Extensions for filing  
 §193.072, F.S. - Penalties  
 §193.074, F.S. - Confidentiality  
 §195.027(4), F.S. - Return Requirements  
 §196.183, F.S. - \$25,000 Exemption  
 § 837.06, F.S. - False Official Statements

### **LINE INSTRUCTIONS**

Within each section, group your assets by year of acquisition. List each item of property separately except for "classes" of personal property. A class is a group of items substantially similar in function, use, and age.

#### **Line 14 - Farm, Grove, and Dairy Equipment**

List all types of agricultural equipment you owned on January 1. Describe property by type, manufacturer, model number, and year acquired. Examples: 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.

#### **Line 16 and 16a - Hotel, Motel, Apartment and Rental Units (Household Goods)**

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

#### **Line 17 - Mobile Home Attachments**

For each type of mobile home attachment (awnings, carports, patio roofs, trailer covers, screened porches or rooms, cabanas, open porches, utility rooms, etc.), enter the number of items you owned on January 1, the year of purchase, the size (length X width), and the original installed cost.

#### **Line 20 - Leasehold Improvements, Physical Modifications to Leased Property**

If you have made any improvements, including modifications and additions, to property that you leased, list the original cost of the improvements. Group them by type and year of installation. Examples: slat walls, carpeting, paneling, shelving, cabinets. Attach an itemized list or depreciation schedule of the individual improvements.

#### **Line 22 - Owned by you but rented to another**

Enter any equipment you own that is on a loan, rental, or lease basis to others.

#### **Line 23 - Supplies**

Enter the average cost of supplies that are on hand. Include expensed supplies, such as stationery and janitorial supplies, linens, and silverware, which you may not have recorded separately on your books.

Include items you carry in your inventory account but do not meet the definition of "inventory" subject to exemption.

#### **Line 24 - Renewable Energy Source Devices**

List all renewable energy source devices as defined in section 193.624, Florida Statutes. Section 196.182, F.S., provides an exemption to renewable energy source devices considered tangible personal property. The exemption is granted based on a percentage of value, when the devices are installed, and what type of property the devices are installed on.

### **COLUMN INSTRUCTIONS**

List all items of furniture, fixtures, all machinery, equipment, supplies, and certain types of equipment attached to mobile homes. For each item, you must report your estimate of the current fair market value and condition of the item (good, average, poor). Enter all expensed items at original installed cost. Do not use "various" or "same as last year" in any of the columns. These are not adequate responses and may subject you to penalties for failure to file.

#### **Taxpayer's Estimate of Fair Market Value**

You must report the taxpayer's estimate of fair market value of the property in the columns labeled "Taxpayer's Estimate of Fair Market Value." The amount reported is your estimate of the current fair market value of the property.

#### **Original Installed Cost**

Report 100% of the original total cost of the property in the columns labeled "Original Installed Cost." This cost includes sales tax, transportation, handling, and installation charges, if incurred. Enter only unadjusted figures in "Original Installed Cost" columns.

The 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 you deducted a trade-in from the invoice price, enter the invoice price. Add back investment credits taken for federal income tax if you deducted those from the original cost. Include all fully depreciated items at original cost, whether written off or not.

#### **Assets Physically Removed**

If you physically removed assets last year, complete the columns in the first section of page 2. If you sold, traded, or gave property to another business or person, include the name in the last column.

#### **Leased, Loaned, and Rented Equipment**

If you borrowed, rented, or leased equipment from others, enter the name and address of the owner or lessor in the second section of page 2. Include a description of the equipment, year you acquired it, year of manufacture (if known), the monthly rent, the amount it would have originally cost had you bought it new, and indicate if you have an option to buy the equipment at the end of the term.





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

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

Sincerely,

Marty Kiar  
Broward County Property Appraiser  
[MartyKiar@bcpa.net](mailto:MartyKiar@bcpa.net)

## 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. Generally, you will not owe any TPP taxes if the total TPP value is below \$25,000.

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**  
**Fort Lauderdale, FL 33301**  
**954-357-6836**  
[web.bcpa.net](http://web.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, an 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 [tgehr@bcpa.net](mailto:tgehr@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://web.bcpa.net>

# TANGIBLE PERSONAL PROPERTY



## Your Responsibilities as a Business Owner

**Marty Kiar**  
Broward County Property Appraiser

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

Twitter: @MartyKiarBCPA

[www.twitter.com/MartyKiarBCPA](http://www.twitter.com/MartyKiarBCPA)

[www.facebook.com/MartyKiarBCPA](http://www.facebook.com/MartyKiarBCPA)

## 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.
- All tangible personal property must be reported, even if it has been fully depreciated or has been "expensed" on your books.

## 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.

## 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 954-357-6174 or [tgehr@bcpa.net](mailto:tgehr@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 a return.
- In Block 9 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, you are required by Florida Statute to list on page 2 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, your first \$25,000 of value is exempt from taxation once you file an initial return. If your resulting tax is less than \$30, you will not receive a tax bill.

## 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 <http://www.broward.org/VAB/Pages/welcome.aspx> or by phone at 954-357-7205.

## IMPORTANT DATES TO REMEMBER

### January 1

- Date of assessment.
- Personal property returns mailed.

### March 1

- 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 20, 2021

- Deadline to file Value Adjustment Board petition.

### November 1

- Tax bills sent by the Broward County Revenue Collector.

TPP Postcard



115 South Andrews Avenue  
Room 111  
Fort Lauderdale, Florida 33301  
[www.bcpa.net](http://www.bcpa.net)

PRESORTED  
FIRST-CLASS MAIL  
U.S. POSTAGE  
PAID  
Marty Kiar  
Broward County  
Property Appraiser

Tax Year 2021

MILL 0312

Property Address: 3201 W COMMERCIAL BLVD 118, FORT LAUDERDALE



Account: 600000003624-B  
EMBRY RIDDLE AERONAUTICAL UNIV  
DANNY SEEPERSAUD-ACCOUNTING  
1 AEROSPACE BLVD  
DAYTONA BEACH FL 32114-3910



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2-2



## **NOTICE TO TAXPAYER WHOSE TANGIBLE PERSONAL PROPERTY RETURN WAS WAIVED IN THE PREVIOUS YEAR**

You are being sent this notice as required by Florida law because your requirement for filing an annual Tangible Personal Property tax return was waived in the previous year.

Based on the value of your tangible personal property last year, you do not have to file a tangible personal property return for this year unless the value of your tangible personal property was more than \$25,000 on January 1 of this year.

- As long as the value of your property remains at \$25,000 or less on January 1 of each year, you will not need to file a tangible personal property return.
- If the value of your property was/is more than \$25,000 on January 1 of last year or any following year, you must file a tangible personal property return, Form DR-405, by April 1.

If you were required to file a return in the previous year but did not, you may have to pay a penalty of 25% of the total tax levied against the property for each year that you did not file, calculated without benefit of the exemption. If you claim more exemptions than allowed, the penalty is the taxes exempted because of the wrongful claim plus 15% interest each year and a penalty of 50% of the taxes exempted. See section 196.183, Florida Statutes.

If you have any questions, please contact us at 954-357-6836 or [tgehr@bcpa.net](mailto:tgehr@bcpa.net).



Marty Kiar - Broward County Property Appraiser  
115 South Andrews Avenue Ste 111  
Fort Lauderdale, Florida 33301-1899

FIRST-CLASS MAIL  
U.S. POSTAGE  
PAID  
Marty Kiar  
Broward County  
Property Appraiser

## IMPORTANT! AGRICULTURAL OR HIGH-WATER RECHARGE RENEWAL



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29

504129-01-0240  
ANDRE JULIAN WEST TR  
WEST, ANDRE WEST TRSTEE  
2400 BRANCH RD  
RALEIGH NC 27610-9208



HORSES 0.46 ACREAGE 0.46

**Detach card, affix postage on reverse side and mail before March 1.**

DR-499  
R. 12/96

**2021 BY LAW, ABSOLUTE DEADLINE FOR FILING IS MARCH 1.**

Property  
Control No.



504129-01-0240

### Renewal Application For 2021

Do you own Tangible Personal Property used in connection with the herein described property? ☐ Yes ☐ No

If yes, do you intend to file a Personal Property Return with the Property Appraiser this year? ☐ Yes ☐ No

Name and Address  
of Property Owner

ANDRE JULIAN WEST TR  
WEST, ANDRE WEST TRSTEE  
2400 BRANCH RD  
RALEIGH NC 27610-9208

Legal  
Description

NEWMANS SURVEY 2-26 D 29-50-41 TR 20 S 135 OF N  
179 OF S1/2 OF E1/2 LESS W 25

HORSES 0.46 ACREAGE 0.46  
Property Address: 4351 SW 92 AVE

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.

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.

☐ Pasture ☐ High-water  
☐ Citrus Recharge  
☐ Forestry ☐ Row Crop

☐ Other \_\_\_\_\_

☐ Used By Owner ☐ 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 1.**

**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 1.**

Detach card, affix postage and mail before March 1.

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



PLACE  
STAMP  
HERE

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

MARTY KIAR  
BROWARD COUNTY PROPERTY APPRAISER  
115 S ANDREWS AVE STE 111  
FT LAUDERDALE FL 33301-1801

# Non-profit Renewal Card

Marty Kiar - Broward County Property Appraiser  
115 South Andrews Avenue Ste 111  
Fort Lauderdale, Florida 33301-1899

PRESORTED  
FIRST-CLASS MAIL  
U.S. POSTAGE  
PAID  
Marty Kiar  
Broward County  
Property Appraiser

## IMPORTANT! TAX EXEMPTION RENEWAL



# 1  
2-1

484117-06-1490  
FLORIDA CONFERENCE ASSN OF  
SEVENTH DAY ADVENTISTS  
351 S STATE ROAD 434  
ALTAMONTE SPRINGS FL 32714-3824



Detach card, affix postage on reverse side and mail before March 1.

DR-498  
R. 01/93

**2021** BY LAW, ABSOLUTE DEADLINE FOR FILING IS **MARCH 1.**

Property Control No.	484117-06-1490
Renewal Application For	
Name and Address of Property Owner	FLORIDA CONFERENCE ASSN OF SEVENTH DAY ADVENTISTS 351 S STATE ROAD 434 ALTAMONTE SPRINGS FL 32714
Legal Description	Type - CHURCH 30 CASTLEWOOD 71-37 B PARCEL B LESS W 490.50 & LESS THAT PT DESC IN OR 9739/559 - Property Address: 11401 W SAMPLE RD

### 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. If the use or ownership of this property has changed, you must notify our office by March 1, 2021. You can contact us at 954-357-6830.

Detach this card, affix postage on reverse side, mail before **March 1, 2021.**

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.

Print Name

Phone Number

Email Address

X

Date: 50

Signature

**If there is any change in the exemption status of this property or any portion thereof, contact the Property Appraiser's Office before March 1.**

**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 1.**

Detach card, affix postage and mail before March 1.



PLACE  
STAMP  
HERE

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

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

**Tax Exemption Renewal**

MARTY KIAR

BROWARD COUNTY PROPERTY APPRAISER

115 S ANDREWS AVE STE 111

FT LAUDERDALE FL 33301-1801

