Property Tax Compliance Services

Barclay Damon's property tax compliance team provides comprehensive real and personal property tax compliance services, assisting clients in the energy industry with all aspects of their property tax obligations. We have extensive experience handling property tax issues associated with generation facilities of all types as well as oil refineries and pipelines. We begin every engagement with a comprehensive portfolio review of property tax liabilities and present a report and recommendations. Our dedicated compliance team offers full support in preparing annual filings with affected jurisdictions, managing and paying tax bills, responding to jurisdictional audits and inquiries, managing PILOT and related types of agreement obligations, and providing budgeting and projection analysis. On an as-needed basis, our professionals work in conjunction with Barclay Damon property tax attorneys to handle appeals. Our goal is to give clients a seamless, cost-effective option for outsourcing some or all of their property tax functions and responsibilities, allowing them to focus more on their core business.

The compliance team is comprised of property tax specialists and administrative personnel who work in conjunction with Barclay Damon property tax attorneys. The group has decades of experience advising and representing clients nationally on all aspects of the property tax liability integral to the taxable assets they own and manage. We use a multilayered property tax management software that accommodates all property types, provides accurate and expedited return filing, handles property tax bill management, and has a variety of tracking and reporting features.

Our property tax compliance team works closely with clients to develop a uniquely focused, efficient property tax liability management program that best suits their needs and seeks to reduce “direct to the bottom line” expenses. We are well equipped to handle property tax issues from start to finish.

Our team routinely delivers the following property tax compliance services to clients:

Review and Compliance

- Receive directly and review all real and personal property tax bills
- Prepare monthly payment projections together with required check requests with tax bill backup
- If desired, upload payment requests to third-party payment processing companies, such as AnyBill
- Enter and track all tax information in our PTMS database system
- Maintain an annual filing calendar for every asset linked to information requests
- Request and receive data from appropriate personnel for filings
- Prepare and submit all filings for property tax returns and exemption forms
- Prepare and submit production tax returns, capacity tax returns, and annual filings linked to property tax
- Track and monitor all economic incentive agreements, such as PILOTs
- Prepare and submit any compliance requirements related to PILOTs or other economic incentives linked to property tax
- Prepare any refund requests required under abatement agreements
- Work directly with assessors to maximize exemptions
- Handle all audits and information requests initiated by assessors
- Maintain a shared file site with all returns, check requests with tax bills, etc.
- Prepare long-term projections for every asset, broken down by individual tax parcel, to be updated annually
- Provide detailed information on tax periods, timing of payments, and related data to assist with accruals

- Address questions from the business and accounting teams as needed
- Provide guidance on property tax treatment of wind, solar, and hydro facilities for renewable energy projects in various states as required
- If needed, review lease agreements and determine and track property tax responsibility

Valuation and Assessment Appeals

- Receive notices of valuation, compare them against projected assessments, address discrepancies with assessors, and, if required, make recommendations for appeals
- Provide detailed assessment analyses and recommendations
- Develop and apply valuation strategies as appropriate for a given asset type
- Provide education and outreach to jurisdictions on assessment issues
- Prepare administrative appeals documentation and work with assessors or hearing officers to resolve

Additional Services

- Provide due diligence and impact analyses for the acquisition of new assets
- Create property tax information compilations for prospective purchasers, which can either be delivered directly or included in a data room

Representative Experience

- Provide comprehensive property tax compliance services for multiple energy clients across the entire United States
- Represent multiple fossil fuel, renewable energy, and asset management companies in handling all property tax issues related to their portfolio of assets
- Recently achieved significant property tax assessment reductions and refunds for clients in multiple states
- Completed due diligence analyses on more than a dozen large-scale projects