

Application for Taxable Value Limitation on Eligible Property

(Government Code, Chapter 403, Subchapter T, Texas Jobs, Energy, Technology and Innovation Act)

FILING INSTRUCTIONS: This application must be completed and submitted to the Comptroller by the applicant or their representative.

The Comptroller will publish all submitted non-confidential application information on its website. The Comptroller is authorized to treat certain application information as confidential and withhold it from publication. **Any confidential information must be fully segregated and comply with all other requirements stated in the Comptroller's rules.**

If necessary, the Comptroller may request additional materials from the applicant.

SECTION 1: Applicant Information

1. Legal name of the applicant under which this application is made
2. Applicant's address
3. Texas Taxpayer I.D. number
4. NAICS code
5. Applicant's form of business (*corporation, limited liability corporation, etc*)
6. Is the applicant current on all tax payments to the State of Texas? Yes No
7. Provide parent company information (*if applicable*)

Parent Company Name _____ Parent Company Tax ID _____

Parent Company Address _____

8. Authorized Company Representative

First Name _____ Last Name _____

Title _____ Organization _____

Mailing Address _____

City _____ State _____ Zip _____

Phone Number _____ Email Address _____

9. Additional Authorized Company Representative (*if applicable*)

First Name _____ Last Name _____

Title _____ Organization _____

Mailing Address _____

City _____ State _____ Zip _____

Phone Number _____ Email Address _____

SECTION 1: Applicant Information (continued)

10. Authorized Company Consultant (if applicable)

First Name Last Name

Title

Firm Name

Phone Number Email Address

SECTION 2: School District Information

1. Authorized School District Representative

First Name Last Name

Title

School District Name

Phone Number Email Address

2. Authorized School District Consultant (if applicable and known)

First Name Last Name

Title

Firm Name

Phone Number Email Address

SECTION 3: Fee

Provide a copy of the check or electronic transfer of the required application fee to the School District in Tab 1.

SECTION 4: Project Information

NOTE: Job and investment requirements for eligible projects located in more than one county are determined by the county with the smallest population.

- 1. In Tab 2, provide a detailed description of the proposed project. Include a legal description of the real property on which the proposed project will be located and the address, if known.
2. The county or counties in which the proposed project will be located
3. The minimum required investment, at the time of application
4. The Central Appraisal District (CAD) that will be responsible for appraising the property
5. The population of the County (or Counties) per the Federal Decennial Census at the time of application

SECTION 4: Project Information (continued)

6. List all taxing entities that have jurisdiction for the property.

M&O (ISD): _____
(Name, tax rate and percent of project)

I&S (ISD): _____
(Name, tax rate and percent of project)

County: _____
(Name, tax rate and percent of project)

City: _____
(Name, tax rate and percent of project)

Hospital District: _____
(Name, tax rate and percent of project)

Water District: _____
(Name, tax rate and percent of project)

Other (describe): _____
(Name, tax rate and percent of project)

Other (describe): _____
(Name, tax rate and percent of project)

7. List all state and local incentives.

County: _____
(Incentive type, percentage, start and end year)

City: _____
(Incentive type, percentage, start and end year)

Hospital District: _____
(Incentive type, percentage, start and end year)

Water District: _____
(Incentive type, percentage, start and end year)

Other (describe): _____
(Incentive type, percentage, start and end year)

Other (describe): _____
(Incentive type, percentage, start and end year)

8. List any grants or loans of public money this project is receiving or expects to receive in Tab 3.

9. If the project is not located entirely within the ISD listed in Section 2, provide maps of the entire project (depicting all other relevant school districts) and any other relevant information in Tab 4. Only the eligible property within the ISD listed in Section 2 is eligible for the limitation from this application.

10. Indicate which zone the land on which proposed new construction or new improvements is located.

- a. An area designated as a Reinvestment Zone under Tax Code Chapter 311 or 312
- b. An Enterprise Zone under Government Code Chapter 2303
- c. A Qualified Opportunity Zone as designated by the Secretary of the United States Treasury
- d. Attach the applicable supporting documentation in Tab 4.
 - i. evidence that the area qualifies as an Enterprise Zone as defined by the Governor’s Office;
 - ii. order, resolution, or ordinance establishing the Reinvestment Zone; or
 - iii. evidence that the Qualified Opportunity Zone has been designated by the Secretary of the United States Treasury; and
 - iv. a high resolution map depicting the eligible property and project boundaries within the Reinvestment/Enterprise zone, any relevant Opportunity Zones, along with the ISD and County boundaries.

A zone must be designated before the agreement is executed.

11. Did the Applicant consider locating the proposed project in a Qualified Opportunity Zone? Yes No

SECTION 5: Eligible Property

1. In Tab 5, provide a detailed list and description of the eligible property for which you are requesting a limitation.

2. The property will be used for one of the following activities:

- a. A Manufacturing Facility as classified in NAICS 311111-339999
- b. Provision of Utility Services as classified in NAICS 221111-221118

SECTION 5: Eligible Property (continued)

- c. Development of Natural Resources defined as Agriculture, Forestry, Fishing and Hunting as classified in NAICS 111110-115310
 - d. Development of Natural Resources defined as Mining, Quarrying, and Oil and Gas Extraction as classified in NAICS 211120-213115
 - e. Research, Development, or Manufacture of high-tech equipment or technology as classified in NAICS 541713-541720
 - f. Related to Critical Infrastructure as classified in:
 - i. NAICS 221310-221330
 - ii. NAICS 424710
 - iii. NAICS 486110-486990
3. Will any of the proposed required investment be leased under a capitalized lease? Yes No

SECTION 6: Ineligible Property

1. **Existing Property:** In Tab 6, provide a high-resolution map that includes a specific and detailed description of all existing property. This includes buildings and improvements existing as of the application complete date. The description must provide sufficient detail to distinguish existing property from future proposed property.
2. **Proposed new property that will not be eligible for this limitation:** In Tab 6, provide a high-resolution map that includes a specific and detailed description of all proposed new property within the project boundary that will not become new improvements. The description must provide sufficient information to distinguish existing property from proposed new property that won't be eligible for the limitation.

SECTION 7: Projected Timeline

NOTE: Construction must commence after the agreement is executed to qualify.

1. Projected commencement of construction _____
2. Projected completion of construction _____
3. Projected commencement of commercial operations _____
4. First year of the incentive period _____
5. Last year of the incentive period _____

SECTION 8: Job and Wage Requirements

NOTE: Applicants are required to offer and contribute to a group health plan for each employee employed in a full-time job in connection with the project.

1. Number of new required jobs applicant will create _____
2. Wage NAICS code _____
 - a. Indicate the NAICS level used (*county, WDA or statewide*) _____
 - b. Texas Workforce Commission Quarterly Census of Employment and Wages Area _____

Q1	Year _____	Wage _____
Q2	Year _____	Wage _____
Q3	Year _____	Wage _____
Q4	Year _____	Wage _____
 - c. Average Annual Wage _____
 - d. 110% of the Average Annual Wage _____

SECTION 9: Limitation as Compelling Factor

1. In Tab 7, explain how the limitation is a compelling factor in a competitive site selection process. Provide information regarding potential project sites outside of Texas and include incentive offers, permits obtained or any incentive programs applied to.
2. Has the applicant entered into any agreements, contracts or letters of intent related to this project? Yes No
If Yes, provide details in Tab 7.
3. Has the applicant made any publicly available statements regarding the proposed project? *(Include any alternate project names)* Yes No
If Yes, attach statements and explain how the limitation is a compelling factor in Tab 7.
4. Has the applicant applied for or received any federal, state or local permits for activities at the proposed project site? Yes No
If Yes, include a list of all permits and dates applied for and received in Tab 7.

SECTION 10: Economic Benefit Statement and Schedules

Tab 8 must include an Economic Benefit Statement along with schedules formatted in Excel.

The economic benefit statement must include the project’s associated economic benefits that, at minimum, consist of the following:

1. the impact on the gross revenues and employment levels of local businesses that provide goods or services in connection with the project or to an applicant’s employees;
2. the amount of state and local taxes that will be generated as a result of the indirect economic impact of the project;
3. the development of complementary businesses or industries that locate in this state as a direct consequence of the project;
4. the total impact of the project on the gross domestic product of this state;
5. the total impact of the project on personal income in this state; and
6. the total impact of the project on state and local taxes.

SECTION 11: Section 403.606 Affidavit

In Tab 9, submit your Section 403.606 Sworn Affidavit.

SECTION 12: Authorized Signature

Authorized Company Representative (Applicant) Signature

I hereby certify and affirm that the applicant has fulfilled all application requirements under Chapter 403, Government Code, and the information provided herein is true and correct to the best of my knowledge, under penalty of perjury. I also affirm that the applicant is in good standing under the laws of Texas and I am authorized to file this application on behalf of the applicant.

Print Name *(Authorized Company Representative (Applicant))*

Title



Signature *(Authorized Company Representative (Applicant))*

Date

If you make a false statement on this application, you could be found guilty of a Class A misdemeanor or a state jail felony under Texas Penal Code Section 37.10.