



# HISTORIC SITE TAX EXEMPTION APPLICATION

## HISTORIC AND CULTURAL LANDMARKS COMMISSION

200 TEXAS STREET

CITY OF FORT WORTH, TX 76102

(817) 392-8574 / Fax: (817) 392-8016

2023 Application Deadline	HCLC Meeting Date	2023 Application Deadline	HCLC Meeting Dates
December 19	January 09	June 20	July 10
January 17	February 13	July 17	August 14
February 20	March 13	August 21	September 11
March 20	April 10	September 18	October 09
April 17	May 10	October 16	November 13
May 15	June 12	November 20	December 11

### How do I obtain the Historic Site Tax Exemption?

The Historic Site Tax Exemption (HSTE) involves a two-part process that requires approval by the Historic Preservation Officer before the project is started, and final verification by the HCLC and the City Council upon completion of the project. The Tax Exemption will go into effect January 1<sup>st</sup> of the year following City Council verification. The Tax Exemption freezes the taxable ceiling of the land and improvements at the pre-renovation values for the purpose of assessing City of Fort Worth taxes. The exemption period is ten (10) years. Application to the Tarrant Appraisal District must be made by the property owner each year of the exemption.

Eligibility for the Tax Exemption requires that an investment equal to or greater than 20% of the assessed valuation of the improvements be spent on rehabilitation. The HPO or HCLC must approve all work requiring a Certificate of Appropriateness in advance. An application for a historic site tax exemption must be received and approved by the HPO **prior to the commencement** of treatment to be eligible to receive the historic site tax exemption. Failure to meet this requirement will bar eligibility for a historic site tax exemption.

### Step 1: Partial Approval

An application may initiate the application process for a historic site tax exemption by submitting a fully completed and signed application to the HPO. The application for a historic site tax exemption must be submitted prior to commencement of treatment. An application for a historic site exemption may be processed concurrently with an application for any COA for the same structure. Once an application for a historic site tax exemption is deemed complete by the HPO, the HPO will send the property owner a letter that sets forth the date that the HPO determined the application to be complete, the base-year taxable value, the projected term of the historic site tax exemption, and the deadline for completion of substantial treatment.

### Step 2: Verification

Upon completion of the stabilization or rehabilitation project, the applicant shall return the documents listed on the HSTE page of the application to the HCLC for verification. If the verification of completion is favorable, the HCLC shall forward your application to the City Council for verification approval. Once verified, City staff notifies the Tarrant Appraisal District of the tax exemption to begin on January 1 of the following year.

If the verification of completion is unfavorable, you shall be required to complete the project in order to secure the HSTE; your application will be returned for consideration of approval after all work has been completed.

**NOTE: Upon verification of the HSTE, a signed and notarized copy of the City of Fort Worth form "Notice of Historic Site Tax Exemption" shall be filed in the office of the Tarrant County Clerk before the City shall grant the HSTE.**

## ACKNOWLEDGEMENTS

I certify that the above information is correct and complete to the best of my knowledge and ability and that I am now or will be fully prepared to present the above application to the Historic and Cultural Landmarks Commission public hearing. I understand that if I am not present or represented at the public hearing, the Landmarks Commission may continue or disapprove/deny the application. I authorize members of the Landmarks Commission and officers of the city to visit and inspect the property.

I understand that there are two steps to receiving the Historic Site Tax Exemption. The first step is submitting the Historic Site Tax Exemption and Certificate of Appropriateness applications to the Historic Preservation Officer prior to starting rehabilitation. I understand that required permits and inspections must be obtained from the Planning Department. The second step in receiving the tax exemption occurs upon completion of the project. I am responsible for submitting the required documentation to the Planning Department for verification of the project's completion by the Landmarks Commission and the City Council.

I agree to provide any additional information necessary for determining eligibility as requested by the Development Services Department, the Landmarks Commission or City Council.

Owner/Agent: \_\_\_\_\_ Date: \_\_\_\_\_

**Si necesita un traductor, por favor marque aquí \_\_\_\_\_. Se proporcionara un traductor sin costo para usted.**



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200 TEXAS STREET    CITY OF FORT WORTH, TX 76102    (817) 392-8574 / Fax: (817) 392-8016

## HISTORIC PROPERTY

Street & Number: \_\_\_\_\_

Zoning: \_\_\_\_\_ HSE (Highly Significant Endangered)    \_\_\_\_\_ HC (Historic & Cultural Landmark)

## PROPERTY OWNER / AGENT

Owner's Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

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

Agent (if any): \_\_\_\_\_ Phone Number: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

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

## PROJECT INFORMATION

Required 20% Expenditure: \$ \_\_\_\_\_ Estimated Expenditures: \$ \_\_\_\_\_

Projected Completion Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

## REQUIRED DOCUMENTS WITH HSTE APPLICATION

- Project Description                       Signed Application                       Photographs of current conditions
- Statement of costs equal to or exceeding 20% of the improvement values

## REQUIRED DOCUMENTS UPON COMPLETION OF HSTE WORK

- Signed Application                       Photographs of finished project                       Copies of all receipts for eligible project costs
- Proof of final inspection by the Planning Department
- Proof that a Certificate of Occupancy has been issued (if applicable)

## DESCRIPTION OF WORK

Please describe in detail the work you intend to complete. If necessary, continue on an additional sheet.

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