

# **TOWN OF WHITESTOWN, INDIANA**

## **PERSONAL AND REAL PROPERTY TAX ABATEMENT APPLICATION MATERIALS**

**TOWN OF WHITESTOWN, INDIANA**  
**PERSONAL AND REAL PROPERTY TAX**  
**ABATEMENT APPLICATION MATERIALS**

**INDEX OF FORMS & DOCUMENTS**

<u>Forms &amp; Documents</u>	<u>Item #</u>
Application for Real Property Tax Abatement .....	1
Application for Personal Property Tax Abatement.....	2
Timetable for Approval of Tax Abatement Application.....	3
Memorandum of Understanding .....	4
Form SB-1(RP).....	5
Form SB-1 (PP).....	6
Form Whitestown Redevelopment Commission Resolution.....	7
Form Whitestown Town Council Resolution .....	8
Form Whitestown Town Council Declaratory Resolution .....	9
Form Whitestown Town Council Confirmatory Resolution .....	10

**ITEM #1**

**APPLICATION FOR REAL PROPERTY  
TAX ABATEMENT**

## **TOWN OF WHITESTOWN, INDIANA**

### **APPLICATION FOR REAL PROPERTY TAX ABATEMENT**

#### *Instructions and Procedures*

Indiana state law requires that this application for real property tax abatement and statement of benefits form (SB-1/RP) be submitted to the Town of Whitestown, Indiana (the "Town") prior to the initiation of the project. Additionally, final approval of the application must be obtained from the Town before starting the construction of real property improvements for which tax abatement is being requested.

The completed application, including all attachments and forms, and fees should be submitted to:

**Town of Whitestown**  
**Attn: Ms. Debra Zachelmeyer, Clerk-Treasurer**  
**3 South Main Street**  
**Whitestown, Indiana 46075**  
**Ph: (317)769-6557**  
**Fax: (317)769-6871**  
**E-Mail: dzachelmeyer@whitestown.in.gov**

Prior to submitting the attached application to the Town, all questions must be answered as completely as possible and must be signed on the Statement of Benefits Form (SB-1/RP) and the last page of the application. Incomplete or unsigned applications will not be accepted as official filings. All applicants are encouraged to discuss the proposed project and tax abatement request with the Presidents of the Whitestown Redevelopment Commission and Whitestown Town Council prior to filing their application.

#### *Fees*

A \$1,000 non-refundable application fee is required when making an application for personal property tax abatement and is payable to the "Town of Whitestown" at the time of submission of the application (the "Initial Application Fee"). All applicants are further required to pay the costs incurred by the Town in its consideration of the application, after taking into account the Initial Application Fee, whether or not the application is approved (such costs may include, but are not limited to, legal, financial, publication and other related charges) (the "Application Review Fee"), which Application Review Fee shall be payable within fourteen (14) days of the applicant's receipt of an invoice from the Town for such costs whether or not the application is approved. In the event the application is approved, the applicant shall be required to pay the dollar amount calculated in accordance with the following schedule, within seven (7) days of the Whitestown Town Council's resolution finally approving the application (the "Final Application Fee"):

- \$200.00 if the value of the real estate improvements is less than \$100,000.00;
- \$800.00 if the value of the real estate improvements is \$100,000.00 or more, but less than \$250,000.00;
- \$1,200.00 if the value of the real estate improvements is \$250,000.00 or more, but less than \$500,000.00;
- \$1,600.00 if the value of the real estate improvements is \$500,000.00 or more, but less than \$750,000.00;
- \$2,000.00 if the value of the real estate improvements is \$750,000.00 or more, but less than \$1,000,000.00;
- \$5,000.00 if the value of the real estate improvements is \$1,000,000.00 or more, but less than \$2,500,000.00;
- \$10,000.00 if the value of the real estate improvements is \$2,500,000.00 or more, but less than \$5,000,000.00;
- \$15,000.00 if the value of the real estate improvements is \$5,000,000.00 or more, but less than \$7,500,000.00;
- \$20,000.00 if the value of the real estate improvements is \$7,500,000.00 or more, but less than \$10,000,000.00;
- \$25,000.00 if the value of the real estate improvements is \$10,000,000.00 or more, but less than \$12,500,000.00;
- \$30,000.00 if the value of the real estate improvements is \$12,500,000.00 or more, but less than \$15,000,000.00;
- \$35,000.00 if the value of the real estate improvements is \$15,000,000.00 or more, but less than \$17,500,000.00;
- \$40,000.00 if the value of the real estate improvements is \$17,500,000.00 or more, but less than \$20,000,000.00;
- \$2.00 per \$1,000.00 if the value of the real estate improvements is more than \$20,000,000.00, up to a maximum fee of \$100,000.00

All companies requesting personal property tax abatement will be required to execute a Memorandum of Understanding with the Town prior to consideration of the tax abatement request, the form of which memorandum is included with this application.

Any requests for additional information or questions should be directed to the following:

**Whitestown Redevelopment Commission**

**Attn: Ms. Dawn Semmler, President**

**3 South Main Street**

**Whitestown, Indiana 46075**

**Ph: (317)610-7612**

**E-Mail: [dsemmler@truetemp.net](mailto:dsemmler@truetemp.net)**

Town of Whitestown, Indiana  
Real Property Tax Abatement Application  
Project Questionnaire

1. Name of the company for which personal property tax abatement is being requested:

2. State the name, title, address, telephone number and e-mail address of a company representative who may be contacted concerning this application:

Name and Title:

Address:

Telephone:

E-Mail Address:

3. State the name, title, address, telephone number and e-mail address of a company representative responsible for filing the required annual compliance forms (Form CF-1) which will be used by the Town to determine if your company is compliant with the terms of the abatement application, including Form SB-1, and whether the abatement will continue or be terminated (the contact should be made aware of the compliance form's importance).

Name and Title:

Address:

Telephone:

E-Mail Address:

4. Location of property for which personal property tax abatement is being sought:

a) Street Address:

b) Tax Parcel Number(s):

Attach a legal description and area map of the proposed project location.

5. What is the amount of the most recent assessment attributable to (this information is available on the most recent property tax form) the real property at the project location:

6. Has this project or tax abatement request been discussed with the President of the Whitestown Redevelopment Commission and/or President of the Whitestown Town Council? \_\_\_\_\_ Yes \_\_\_\_\_ No

7. Does your company currently conduct manufacturing operations, research and development, distribution and/or information technology research at this location? If so, how long has your company been at this location?

---

---

8. Does your business have other operations in Indiana? If so, please list the location of the other operations.

9. What is the size of the facility to be improved or constructed?

---

10. On a separate page, briefly describe the nature of the business of your company.

11. On a separate page, briefly describe the proposed real estate improvements to be constructed by your company at the project location.

12. Have the proposed real estate improvements been constructed (Please note that State statute requires applicants to delay construction until after abatement has been granted)?

Yes No

13. What is the anticipated date for construction to begin? \_\_\_\_\_

14. What is the anticipated date for project completion?

15. If a facility is being improved, does the proposed improvement to the facility change the function of the current facility?

Yes No

a) If yes, please describe the any new functions to be performed at the improved facility:

b) What is the estimated value of the real property improvement for which real property tax abatement is being requested? \_\_\_\_\_

16. Complete the following profile of the Company that will occupy the property for which tax abatement is being requested:

a) Number of current full time permanent hourly employees by skill level (include average hourly wage rate excluding benefits and overtime)

Skilled \_\_\_\_\_ Average hourly wage rate for skilled positions \_\_\_\_\_

Semi-skilled \_\_\_\_\_ Average hourly wage rate for semi-skilled positions \_\_\_\_\_

Clerical \_\_\_\_\_ Average hourly wage rate for clerical positions \_\_\_\_\_

Salaried \_\_\_\_\_ Average salary (per hour) for salaried positions \_\_\_\_\_

TOTAL NUMBER OF EXISTING EMPLOYEES (permanent and full-time)

\_\_\_\_\_

b) Number of current part-time hourly employees by skill level (include average hourly wage rate excluding benefits and overtime)

Skilled \_\_\_\_\_ Average hourly wage rate for skilled positions \_\_\_\_\_

Semi-skilled \_\_\_\_\_ Average hourly wage rate for semi-skilled positions \_\_\_\_\_

Clerical \_\_\_\_\_ Average hourly wage rate for clerical positions \_\_\_\_\_

TOTAL NUMBER OF EXISTING EMPLOYEES (part-time)

\_\_\_\_\_

c) Approximate value of benefits for existing and new employees on a per hour basis (e.g. benefits are valued at an additional \$3.00 per hour, etc.)

d) Summary of benefits for existing and new employees.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

e) Number of created full-time permanent hourly employees by skill level (include average hourly wage rate excluding benefits and overtime)

Skilled \_\_\_\_\_ Average hourly wage rate for skilled positions \_\_\_\_\_

Semi-skilled \_\_\_\_\_ Average hourly wage rate for semi-skilled positions \_\_\_\_\_

Clerical \_\_\_\_\_ Average hourly wage rate for clerical positions \_\_\_\_\_

Salaried \_\_\_\_\_ Average salary (per hour) for salaried positions \_\_\_\_\_

TOTAL NUMBER OF NEW EMPLOYEES (permanent and full-time)

\_\_\_\_\_

- f) Number of created part-time hourly employees by skill level (include average hourly wage rate excluding benefits and overtime)

Skilled \_\_\_\_\_ Average hourly wage rate for skilled positions \_\_\_\_\_

Semi-skilled \_\_\_\_\_ Average hourly wage rate for semi-skilled positions \_\_\_\_\_

Clerical \_\_\_\_\_ Average hourly wage rate for clerical positions \_\_\_\_\_

Salaried \_\_\_\_\_ Average salary (per hour) for salaried positions \_\_\_\_\_

TOTAL NUMBER OF NEW EMPLOYEES (part-time)

\_\_\_\_\_

- g) What is the total dollar amount to be spent on new salaries?

- h) Provide schedule for when new employee positions are expected to be filled.

\_\_\_\_\_  
\_\_\_\_\_

17. On a separate page, please give a detailed description of what the impact on your business will be if the proposed real property improvement is not constructed (e.g. loss of jobs, contract cancellations, loss of production, change in location, etc.).

18. What is the term of the tax abatement requested (maximum 10 years). \_\_\_\_\_

19. Complete the following schedule concerning the proposed real property taxes to be abated and include on a separate page the worksheets for calculating the figures provided below:

I. Projected Current Conditions Without Abatement

A. Current Annual Real Property Taxes:

B. Projected 10-Year Total:

II. Projected Conditions With Abatement

A. Projected 10-Year Real Property Taxes:

B. Projected 10-Year Abatement:

III. Projected Total (Assumes Abatement Granted)

A. Total Amount Abated:

B. Total Taxes to be Paid:

**Note:** Attach Worksheets

20. Which approvals or permits will be required for the project?

- |                      |                       |
|----------------------|-----------------------|
| (a) zoning change    | (e) variance          |
| (b) annexation       | (f) special exception |
| (c) plat approval    | (g) building permit   |
| (d) development plan | (h) other _____       |

21. Will additional public infrastructure/facilities be required? If so, please explain in detail costs/funding source and schedule for construction.

---

---

22. For the proposed project, is the applicant requesting other incentives from the Town (e.g., tax increment financing, economic development revenue bond financing)? If so, please explain. \_\_\_\_\_

23. Please describe any community involvement/contributions the applicant has provided in the past and/or expects to provide in the future.

---

---

24. Will local suppliers and contractors be used in the construction/operation of the proposed project? If so, please explain. \_\_\_\_\_

25. Has the applicant previously been approved for economic development incentives from the Town (e.g., tax abatement, tax increment financing, economic development revenue bond financing)? If so, please explain and include information with respect to applicant's compliance with project representations made to the Town at the time the incentives were approved.

---

---

26. Is the applicant current on all of its payment obligations to the Town and the County (e.g., property taxes, utility (gas, water, sewer, electric) fees (such as capacity fees, monthly services charges), guaranties on any debt obligations, etc.)?

---

---

27. Does the proposed project take advantage of any “green” technology to reduce adverse environmental impact? If so, please explain.

---

---

CHECKLIST OF ATTACHMENTS:

- \_\_\_\_\_ Initial Application Fee (\$1,000)
- \_\_\_\_\_ Completed Memorandum of Understanding
- \_\_\_\_\_ Completed Form SB-1/RP
- \_\_\_\_\_ Legal Description of Project Site
- \_\_\_\_\_ Area Map of Project Site
- \_\_\_\_\_ Description of Business at Site
- \_\_\_\_\_ Description of Improvements to Site
- \_\_\_\_\_ Description of Impact on Business if Improvements not Constructed
- \_\_\_\_\_ Worksheets for Abatement Calculation



**ITEM #2**

**APPLICATION FOR PERSONAL PROPERTY  
TAX ABATEMENT**

## TOWN OF WHITESTOWN, INDIANA

### APPLICATION FOR PERSONAL PROPERTY TAX ABATEMENT

#### *Instructions and Procedures*

Indiana state law requires that this application for personal property tax abatement and statement of benefits form (SB-1/PP) be submitted to the Town of Whitestown, Indiana (the "Town") prior to the initiation of the project. Additionally, final approval of the application must be obtained from the Town before starting the installation of the new manufacturing equipment, research and development equipment, logistical distribution equipment and/or information technology equipment, for which tax abatement is being requested.

The completed application, including all attachments and forms, and fees should be submitted to:

**Town of Whitestown**  
**Attn: Ms. Debra Zachelmeyer, Clerk-Treasurer**  
**3 South Main Street**  
**Whitestown, Indiana 46075**  
**Ph: (317)769-6557**  
**Fax: (317)769-6871**  
**E-Mail: [dzachelmeyer@whitestown.in.gov](mailto:dzachelmeyer@whitestown.in.gov)**

Prior to submitting the attached application to the Town, all questions must be answered as completely as possible and must be signed on the Statement of Benefits Form (SB-1/PP) and the last page of the application. Incomplete or unsigned applications will not be accepted as official filings. All applicants are encouraged to discuss the proposed project and tax abatement request with the Presidents of the Whitestown Redevelopment Commission and Whitestown Town Council prior to filing their application.

#### *Fees*

A \$1,000 non-refundable application fee is required when making an application for personal property tax abatement and is payable to the "Town of Whitestown" at the time of submission of the application (the "Initial Application Fee"). All applicants are further required to pay the costs incurred by the Town in its consideration of the application, after taking into account the Initial Application Fee, whether or not the application is approved (such costs may include, but are not limited to, legal, financial, publication and other related charges) (the "Application Review Fee"), which Application Review Fee shall be payable within fourteen (14) days of the applicant's receipt of an invoice from the Town for such costs whether or not the application is approved. In the event the application is approved, the applicant shall be required to pay the dollar amount calculated in accordance with the following schedule, within seven (7)

days of the Whitestown Town Council's resolution finally approving the application (the "Final Application Fee"):

- \$200.00 if the value of the new equipment is less than \$100,000.00;
- \$800.00 if the value of the new equipment is \$100,000.00 or more, but less than \$250,000.00;
- \$1,200.00 if the value of the new equipment is \$250,000.00 or more, but less than \$500,000.00;
- \$1,600.00 if the value of the new equipment is \$500,000.00 or more, but less than \$750,000.00;
- \$2,000.00 if the value of the new equipment is \$750,000.00 or more, but less than \$1,000,000.00;
- \$5,000.00 if the value of the new equipment is \$1,000,000.00 or more, but less than \$2,500,000.00;
- \$10,000.00 if the value of the new equipment is \$2,500,000.00 or more, but less than \$5,000,000.00;
- \$15,000.00 if the value of the new equipment is \$5,000,000.00 or more, but less than \$7,500,000.00;
- \$20,000.00 if the value of the new equipment is \$7,500,000.00 or more, but less than \$10,000,000.00;
- \$25,000.00 if the value of the new equipment is \$10,000,000.00 or more, but less than \$12,500,000.00;
- \$30,000.00 if the value of the new equipment is \$12,500,000.00 or more, but less than \$15,000,000.00;
- \$35,000.00 if the value of the new equipment is \$15,000,000.00 or more, but less than \$17,500,000.00;
- \$40,000.00 if the value of the new equipment is \$17,500,000.00 or more, but less than \$20,000,000.00;
- \$2.00 per \$1,000.00 if the value of the new equipment is more than \$20,000,000.00, up to a maximum fee of \$100,000.00

