



The Merriam-Webster dictionary defines a niche as "a place, employment, status, or activity for which a person or thing is best fitted" Our niche is *relentless attention to detail*. With our meticulous approach, we have earned the respect of assessing officers across the Country. More importantly, we have earned the respect of our clients. This is evidenced by the fact that more than 90% of our new business comes from customer referrals. Please let us know if we can assist you in any way.

### ***Mission Statement***

*"To provide a full array of property tax consulting services, focusing on the needs of our clients. To deliver superior service at a competitive price. To represent the best interest of our clients in a professional and ethical manner. To empower our staff in the building of a world-class team by affirming our commitment to excellence in every project we undertake."*

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### ***Company History***

From 1977 to 1993, Jim Schwalls was a tax consultant and Executive Vice President with the national firm, George McElroy & Associates, Inc. In 1993, Jim decided to make a change and became a principal of D. Allen Bowlby & Associates. In 1995 the two mutually agreed that they would split the business into separate companies. At that time, Jim Schwalls & Associates was formed.

Jim Schwalls & Associates provides attention to the individual needs of the client and utilizes a comprehensive approach to analyzing every property. The depth, breadth and active involvement of the Principal, coupled with the motivation to over-achieve, differentiate Jim Schwalls & Associates from the competition. The consistent delivery of superior service has produced a long-term track record of success.

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### ***Client Services***

#### **Compliance Filings**

Real estate renditions or assessment reports; personal property renditions or sworn asset listing; exemption or special appraisal applications.

#### **Protest & Appeal Administration**

Filing protest documents with local/state appraisal offices. Review administrative rulings and provide recommendations concerning potential state board appeal and/or litigation.

#### **Value Analysis and Negotiation**

Analysis of tax appraisals via JSA's valuation models. Resolve valuation disputes informally with appraisal offices. Present evidence and testimony before appraisal review or equalization boards.

#### **Tax Appraisal and Estimated Tax Projections**

Prepare estimated tax appraisal and estimated tax projections for budgeting purposes. Research appraisal and tax information for properties being considered for acquisition or planned construction.

#### **Tax Statement Processing**

Receive tax statements from tax collector on behalf of client. Review tax statements to verify correct taxable value and tax levy calculations. Prepare "Tax Payment Approval Report" to accompany transmittal of tax statements to client.

#### **Reporting**

Standard reports include proposed value notification / recommendations, appeal results / recommendations, tax estimates when assessments change, and tax statement transmittal. Custom reports can be designed to specific requirements. Real time on-line reporting is available through our PTAdvisor interface.



## ***Nation-Wide Experience***

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We are currently representing our client's interests in more than 46 States. We are particularly active in the States of Texas, Tennessee, Colorado, Nebraska, Kansas, Florida, California, Georgia, Massachusetts, Michigan, Illinois, Maryland, and Virginia.

We stay abreast of the latest changes by developing and maintaining excellent working relationships with the various Assessors, Property Appraisers and Appraisal Districts. We closely monitor various trade publications, newsletters and subscription services that provide us with up-to-the-minute legislative updates and recent case law. We also network on a regional basis with some of the finest professionals in our industry. We are adept at fully utilizing the rapidly growing resources that are available on-line. This enables us to eliminate needless travel costs thus reducing our overhead.

## ***PTD Advisor***

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PTDadvisor is a web interface developed by JSA to enable our clients to view and print reports from our Property Tax Database (PTD). Our 'Advisor' browser based software interfaces real-time with our database, which allows our clients to retrieve current information via the Internet.

- > Client Login security allows only approved users to view data
- > View a summary listing of your properties
- > View a detailed listing of your properties showing each tax parcel. Data can be sorted by name, your internal ID, or tax parcel ID
- > Preview reports for individual properties or your entire property listing
- > Print reports generated in real time in a "print friendly" format
- > Download spreadsheets that can be customized to your specific requirements

## ***Contact***

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### ***General Correspondence:***

P.O. Box 3075  
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### ***Overnight Delivery:***

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### ***Telephone / Fax:***

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### ***Email Contact:***

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***[www.schwalls.com](http://www.schwalls.com)***