Date: _____

Dear Tax Abatement Applicant:

First let us take this opportunity to thank you for inquiring about the City of South Bend's residential tax abatement program. Next, we want to make you aware of four important items that will help you in your planning process and setting your construction schedule:

1. State law requires that you **do not pull any building permit** before receiving approval of your tax abatement petition from the Common Council. If you pull the building permit before receiving Council approval, your petition will not be considered.

2. The Common Council requires a minimum of 15 calendar days to examine your petition and our office requires at least an additional 15 calendar days to review it and prepare a report to the Council. This period of time could be increased if your property is located in a Development or Redevelopment Area as approved by the South Bend Redevelopment Commission.

3. The current owner or owners of the property for which the tax abatement is being requested must sign the petition.

4. For real estate developments and new construction involving property boundary changes, tax abatement petitions will not be considered for review until after the development or construction project has been submitted for final plat approval.

In response to your request, please find the following three forms enclosed that are titled: "Statement of Benefits Real Estate Improvements" (Form SB-1/Real Property), "City of South Bend Petition for Residential Property Tax Abatement" (application) and "Requirements For All Petitions Seeking Single Family Residential Development Real Property Tax Abatement Consideration For Multiple Parcels" (The last form is only applicable to builders/developers of subdivisions that contain two or more buildable lots.). The three forms are mostly self explanatory, however, please feel free to call us at 574-235-9371 should you have any questions. Upon completion of the forms, please return them to the City Clerk's Office in Room 455, County-City Building, 227 W. Jefferson Blvd., South Bend, IN 46601 along with an application fee of $50.00 made

payable to the City of South Bend. We will then be in contact with you regarding the schedule of meetings to complete the abatement process.

Once again, thank you for your interest in the program. We look forward to hearing from you.

Sincerely,

The Economic Division
Department of Community and Economic Development
City of South Bend

CITY OF SOUTH BEND, INDIANA
PETITION FOR RESIDENTIAL TAX ABATEMENT CONSIDERATION

The undersigned owner(s) of real property, located within the City of South Bend, hereby petition the Common Council of the City of South Bend for Residential Real Property tax abatement consideration and pursuant to I.C., 6-1.1-12.1-1, et seq., and South Bend Municipal Code Sec. 2-76 et seq., for this petition state the following:

1. Describe the proposed construction project, including information about square footage, number of rooms, number of stories, other amenities such as finished basements and garages, the amount of land to be used, the proposed use of the improvements, and a general statement as to the importance of the project (use additional sheet for long project descriptions):

   _____
   _____
   _____
   _____
   _____

2. Estimate the dollar value of the construction project (do not include land cost): $_____.

3. The real property for which tax abatement consideration is petitioned (Property) is owned or to be owned by the following individual(s) or corporation(s) (if the business organization is publicly held, indicate also the name of the corporate parent, if any, and the name under which the corporation has filed with the Securities and Exchange Commission):

Name	Address	Interest

4. The commonly known address of the Property is: _____ and having tax key no.:_____ (use additional sheet for multiple addresses or key numbers).

5. A legal description of said Property(s) is attached hereto, marked Exhibit A, and is incorporated herein.

6. A map and/or plat indicating the location of the Property(s) is attached hereto, marked Exhibit B, and is incorporated herein.

7. Photographs of the Property(s), taken within two (2) weeks of the filing of this petition, are attached hereto, marked Exhibit C, and incorporated herein.

8. The current assessed valuation of the property before construction is $_____ (use additional sheet for multiple addresses). (Information may be obtained from the St. Joseph County Assessor's Office, 235-9523).

9. List the real property taxes paid at the location during the previous two years, whether paid by the current owner or a previous owner (use additional sheet for multiple addresses):

   _____
   _____
   _____

   (This information may be obtained from the St. Joseph County Treasurers office, 235-9531)

10. What is your best estimate of the after completion market value of the property: $_____.

(Rev. 5/13/11)

11. No building permit has been issued for construction on the property in connection with the improvement in question as of the date of filing of this petition. The building permit may be issued after the South Bend Common Council has approved the Declaratory Resolution. (Tax abatement is not available if a building permit has already been issued). The signature below is verification of this statement.

12. List other anticipated public financing for the project, including any assistance to be sought or already authorized through the United States Department of Housing and Urban Development funds from the City of South Bend, South Bend Housing Authority, Housing Assistance Office, St. Joseph County Housing Consortium or other public financial assistance, including but not limited to public works improvements:
_____
_____
_____

13. Describe how the property has become undesirable for or impossible of normal development because of a lack of development, cessation of growth, deterioration of improvements or other factors which have impaired values and prevent a normal development of the property:
_____
_____
_____
_____

14. The current use of the property is _____ and the current zoning is _____ (use). (This information may be obtained from the Building Department 235-9553)

15. The property is located in the following Allocation Area (if any) declared and confirmed by the South Bend Redevelopment Commission (requiring approval of the tax abatement by the Redevelopment Commission):
_____

16. The following person should be contacted as the petitioner's agent regarding additional information and public hearing notifications:

Name _____
Address _____
City, State, Zip _____
Telephone _____
E-mail Address _____

WHEREFORE, Petitioner has paid the required fee of $50.00 and requests that the Common Council of the City of South Bend, Indiana, adopt a declaratory resolution designating the area described herein as a residentially distressed area for the purposes of real property tax abatement consideration, and after publication of notice and public hearing, determine that the qualifications for a residentially distressed area have been met and confirm such resolution.

Name of Property Owner(s):

_____

By: _____
(Signature)

_____
(Typed or printed name and capacity)

(Rev. 5/13/11)

CITY OF SOUTH BEND, INDIANA
REQUIREMENTS FOR ALL PETITIONERS SEEKING SINGLE-FAMILY RESIDENTIAL DEVELOPMENT REAL PROPERTY TAX ABATEMENT CONSIDERATION FOR MULTIPLE PARCELS

As a condition of granting a petition which seeks single-family residential real property tax abatement consideration for development of multiple parcels in the City of South Bend, Indiana, the petitioner seeking such abatement pursuant to the applicable provisions of the *Indiana Code*, the *Indiana Administration Code* and the *South Bend Municipal Code* must additionally agree to the following:

1. **Filing Requirement with the Office of The City Clerk**: File with the Office of the City Clerk, 4th Floor County-City Building, South Bend, Indiana 46601, prior to the South Bend Common Council taking final action on a petitioner's Confirmatory Resolution for single-family residential construction where multiple parcels are involved and which is specifically addressed in § 2-77 of the *South Bend Municipal Code*, the petitioner's written information statement to be given to all individuals inquiring about any parcels in the petitioned area.

2. **Required Contents of Information Statement**: Said information statement must be on the petitioner's official stationary which lists their business name, street address, city, state and zip code, telephone and facsimile numbers, email address if any, and contact person(s) and which must include the following:

- Official name of the development as listed in the documents of record with the Office of the City Clerk of South Bend, Indiana

- A map of the development addressed by the abatement listing the property key number for the parcel in question as well as its street address

- Verification of the number of years granted by the tax abatement and the month/year the final action was taken by the South Bend Common Council

- Verification and confirmation of the abatement's maximum dollar amount of the assessed value of the improvements on the parcel in question and a statement that the assessed value of the land is not abated

- Verification of the petitioner (developer's) duties with regard to the Statement of Benefits form (SB-1)

- Verification of the proposed property owner(s)' duties with regard to the FORM 322/RE which must be completed and filed by the owner and builder after completion of the home and prior to occupancy, with said form being attached to the Information Statement

- An attachment of the Confirmatory Resolution which approved the abatement in question

- Inclusion of contact information, including but not limited to:

  Department of Community and Economic Development
  Division of Economic Development
  1200 County-City Building
  South Bend, Indiana 46601
  (574) 235-9371 (574) 235-9021 Facsimile

  St. Joseph County Auditor's Office
  2nd Floor County-City Building
  South Bend, Indiana 46601
  (574 235-9668 (574) 235-5024 Facsimile

  Office of the City Clerk
  4th Floor County-City Building
  South Bend, Indiana 46601
  (574) 235-9221 (574) 235-9173 Facsimile

3. **Required Filing of All Revised Information Statements**: Any Information Statements which are revised should be filed with of Office of the City Clerk as soon as practicable by the petitioner/developer and in no event filed later than their first use with prospective property owners in the affected tax abatement area.

I, _____, the petitioner of record seeking single-family residential development real property tax abatement consideration for multiple parcels in the City of South Bend, Indiana, for the abatement commonly referred to as _____ hereby acknowledges the requirements set forth herein and agree to abide by such conditions.

_____
(Signature)
Typed Name of Record
Address and Telephone Number of Record

_____
Witness Signature
Typed Name and Official Capacity
Address and Telephone Number

Signed this ___ day of _____, 2____

STATEMENT OF BENEFITS
REAL ESTATE IMPROVEMENTS

State Form 51767 (R2 / 1-07)
Prescribed by the Department of Local Government Finance

20____ PAY 20____
FORM SB-1 / Real Property

This statement is being completed for real property that qualifies under the following Indiana Code (*check one box*):

☐ Redevelopment or rehabilitation of real estate improvements (IC 6-1.1-12.1-4)
☐ Eligible vacant building (IC 6-1.1-12.1-4.8)

INSTRUCTIONS:

1. *This statement must be submitted to the body designating the Economic Revitalization Area prior to the public hearing if the designating body requires information from the applicant in making its decision about whether to designate an Economic Revitalization Area. Otherwise this statement must be submitted to the designating body* ***BEFORE*** *the redevelopment or rehabilitation of real property for which the person wishes to claim a deduction. "Projects" planned or committed to after July 1, 1987, and areas designated after July 1, 1987, require a STATEMENT OF BENEFITS. (IC 6-1.1-12.1)*
2. *Approval of the designating body (City Council, Town Board, County Council, etc.) must be obtained prior to initiation of the redevelopment or rehabilitation,* ***BEFORE*** *a deduction may be approved.*
3. *To obtain a deduction, application Form 322 ERA/RE or Form 322 ERA/VBD, Whichever is applicable, must be filed with the County Auditor by the later of: (1) May 10; or (2) thirty (30) days after the notice of addition to assessed valuation or new assessment is mailed to the property owner at the address shown on the records of the township assessor.*
4. *Property owners whose Statement of Benefits was approved after June 30, 1991, must attach a Form CF-1/Real Property annually to the application to show compliance with the Statement of Benefits. [IC 6-1.1-12.1-5.1(b) and IC 6-1.1-12.1-5.3(j)]*
5. *The schedules established under IC 6-1.1-12.1-4(d) for rehabilitated property and under IC 6-1.1-12.1-4.8(1) for vacant buildings apply to any statement of benefits approved on or after July 1, 2000. The schedules effective prior to July 1, 2000, shall continue to apply to a statement of benefits filed before July 1, 2000.*

SECTION 1 — TAXPAYER INFORMATION

Name of taxpayer		
Address of taxpayer *(number and street, city, state, and ZIP code)*		
Name of contact person	Telephone number	E-mail address

SECTION 2 — LOCATION AND DESCRIPTION OF PROPOSED PROJECT

Name of designating body		Resolution number
Location of property	County	DLGF taxing district number
Description of real property improvements, redevelopment, or rehabilitation *(use additional sheets if necessary)*		Estimated start date (*month, day, year*)
		Estimated completion date (*month, day, year*)

SECTION 3 — ESTIMATE OF EMPLOYEES AND SALARIES AS RESULT OF PROPOSED PROJECT

Current number	Salaries	Number retained	Salaries	Number additional	Salaries

SECTION 4 — ESTIMATED TOTAL COST AND VALUE OF PROPOSED PROJECT

NOTE: Pursuant to IC 6-1.1-12.1-5.1 (d) (2) the **COST** of the property is confidential.	**REAL ESTATE IMPROVEMENTS**	
	COST	**ASSESSED VALUE**
Current values		
Plus estimated values of proposed project		
Less values of any property being replaced		
Net estimated values upon completion of project		

SECTION 5 — WASTE CONVERTED AND OTHER BENEFITS PROMISED BY THE TAXPAYER

Estimated solid waste converted (*pounds*) _____	Estimated hazardous waste converted (*pounds*) _____

Other benefits

SECTION 6 — TAXPAYER CERTIFICATION

I hereby certify that the representations in this statement are true.

Signature of authorized representative	Title	Date signed *(month, day, year)*

FOR USE OF THE DESIGNATING BODY

We have reviewed our prior actions relating to the designation of this Economic Revitalization Area and find that the applicant meets the general standards adopted in the resolution previously approved by this body. Said resolution, passed under IC 6-1.1-12.1, provides for the following limitations:

A. The designated area has been limited to a period of time not to exceed _____ calendar years * *(see below)*. The date this designation expires is _____ .

B. The type of deduction that is allowed in the designated area is limited to:
   1. Redevelopment or rehabilitation of real estate improvements ☐ Yes ☐ No
   2. Residentially distressed areas ☐ Yes ☐ No
   3. Occupancy of a vacant building ☐ Yes ☐ No

C. The amount of the deduction applicable is limited to $ _____.

D. Other limitations or conditions *(specify)*_____

E. The deduction is allowed for _____ years* *(see below)*.

We have also reviewed the information contained in the statement of benefits and find that the estimates and expectations are reasonable and have determined that the totality of benefits is sufficient to justify the deduction described above.

Approved (*signature and title of authorized member of designating body*)	Telephone number	Date signed *(month, day, year)*
Attested by (*signature and title of attester*)	Designated body	

* If the designating body limits the time period during which an area is an economic revitalization area, it does not limit the length of time a taxpayer is entitled to receive a deduction to a number of years designated under IC 6-1.12-12.1-4.

A. For residentially distressed areas, the deduction period may not exceed five (5) years.
B. For redevelopment and rehabilitation or real estate improvements:
   1. If the Economic Revitalization Area was designated prior to July 1, 2000, the deduction period is limited to three (3), six (6), or ten (10) years.
   2. If the Economic Revitalization Area was designated after June 20, 2000, the deduction period may not exceed ten (10) years.
C. For vacant buildings, the deduction period may not exceed two (2) years.