

## **Silver Oak Advisors LLC**

Financial Solutions that impact your bottom line

# **Property Tax Solutions**

Silver Oak Advisors professionals have been providing corporate property tax services bringing a total of more than 40 years of combined experience.

We have the experienced property tax subject-matter specialists. They have gained the trust of clients, assessors and peer groups by exercising quality judgment, unimpeachable integrity and unabated persistence in effectively managing property taxes.



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# First and foremost, we excel because our emphasis is on technical expertise.

This fact becomes critically important when you are in need of a qualified and experienced advocate to work on your behalf. As a client of Silver Oak Advisors, you receive the most competent taxpayer representation in the industry. In short, we'll defend and protect your interests as though they were our own.

We bring unmatched expertise and focus to the specialized areas of property tax consulting, property tax valuation, compliance and protest & appeal services.

We excel in the valuation of taxable real and personal property. By performing a comprehensive valuation analysis, we accurately determine the value of taxable property and establish what should be the basis for your property tax liability.

At the same time, we make it our business to carefully examine the methodology being used by the tax assessor in a given appraisal situation. Business conditions are never static. Dynamic forces that affect the value of your assets are constantly at work. For this reason, it is critical that the valuation work of the tax assessor be thoroughly examined to determine whether the assessor has properly dealt with abatements and exemptions, physical depreciation, functional and economic obsolescence, capitalization and discount rates, intangible property issues, and environmental impairment issues.

## **Is your company expanding or relocating?**

Property tax considerations play a major role as businesses build, expand, and determine where to locate. Silver Oak Advisors provides services such as the evaluation of property tax incentives, the consideration of tax consequences, the negotiation of property tax abatements, and other tax related incentive services.

## **Are you looking for Local Knowledge and Industry Expertise?**

Although Silver Oak Advisors operates out of Atlanta, GA, we represent clients throughout the United States, we know and appreciate the local environments in which our clients operate.

Silver Oak Advisors was formed because of the absolute necessity for property owners to have access to a true, national tax consulting service that uses local and “specific property type” experts for every assignment.

Today, the most sought after professionals in our business work for themselves in smaller practices and boutique law firms. Silver Oak manages the use of the best local consultants in your markets throughout the United States. Silver Oak acts as the manager and oversight conduit that brings these local professionals together to work for our clientele, while providing a single point of contact and source of information.

Our industry owes it to our clientele to be well informed, calculated, and precise when it comes to representing a taxpayer. Only a qualified consultant with local experience can make that claim every time they act on behalf of a client. Large national consulting firms owe it to their clientele to admit that while they can “do the job” on a property not in their own community, a locally-qualified consultant would simply do that job better.

We encourage you to examine your own portfolio and determine if you have a locally-qualified consultant for each and every asset you own or control. If you are using a large, conventional property tax firm with regional offices in a few or possibly several places around the country, chances are you don't. If that is the case, we would welcome the opportunity to demonstrate what Silver Oak's business model and services can do for you.

**Industry expertise:**

Chemicals	Communications	Healthcare	Leasing
Manufacturing	Metals and Mining	Real Estate	High-Tech
Transportation	Utilities	Publishing	

**Services offered:**

Real estate assessment reviews

Personal property assessment reviews

Leasing services

Appeals and administration

Pro-active compliance

Business personal property inventory and/or valuation

Cost segregation

Sales and use tax

Tax bill administration

IRB/Abatement review

## **Who is Silver Oak Advisors?**

### **Glenn Williams—Managing Director**

- Former Senior Manager and Complex Properties Practice Leader, KPMG
- Combined over 20 years experience in State and Local Taxation with the Big Four professional services firms
- Specialization and Expertise with Manufacturing, Industrial and Utility properties
- Specialization in Identification and Certification of Pollution Control Tax Exemptions and Credits
- Formerly managed the Personal Property Tax Compliance Group for a major accounting firm, representing national clients in tax compliance, consulting, appeals and audit defense work
- Developed specific initiatives and marketing studies within the transportation, chemical fertilizer, paper and pulp, sugar and high-tech industries to assist clients in reducing ad valorem property taxes, based upon functional and economic obsolescence trends

### **Brian Scully—Director**

- Former Senior Manager and Communications Industry Practice Leader, Paradigm Tax Group (formerly KPMG's National Property Tax Practice)
- Former Manager, Complex/Industrial Personal Property Tax, KPMG
- Specialization and Expertise in Telecom, Cable and Broadband properties
- Formerly managed a large retail U.S and Puerto Rico Personal Property Tax Department overseeing 2,000+ tax returns annually, appeals and accruals and in-house reporting with a business personal property tax liability of \$75,000,000.
- Experienced in Retail, Warehouse, Distribution, Fleet Transportation and Corporate Aviation

## Who is Silver Oak Advisors? cont'd

### Jeff Talton—Director

- Former Manager, Complex/Industrial Property Tax Practice, Paradigm Tax Group
- Developed and implement innovative state and local tax strategies concerning public utilities, telecommunications and manufacturing industries
- Former Senior Consultant, Complex Properties, Deloitte
- Six year experience in State and Local Taxation with the Big Four professional services firms, specializing in ad valorem property tax issues
- Former Consultant, Complex/Industrial Property Tax, KPMG



For more information:

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