

WHO IS SILVER OAK ADVISORS?

Silver Oak Advisors' founders bring over 40 years of Big 4 and Industry property tax experience. Silver Oak was formed to provide taxpayers in need of State and Local Tax (SALT) assistance. We are former Big 4 and industry experienced professionals with specific industry and/or property expertise. In addition to having a working knowledge, we have relationships with the specific state or local taxing jurisdictions.

Most firms *are forced* to use internal firm personnel for all engagements regardless if use of the professional is in the best interest of the client. Silver Oak recognizes this problem and has a team of the best SALT professionals with expertise in your industry and in the markets throughout the U.S. who work directly with our Directors to handle your SALT issues.

Today, the most sought after professionals in our business work for themselves in smaller practices and boutique law firms. Silver Oak works together with these firms to supplement our professional's expertise in order to provide our clientele with the "best in class". This gives your company the right professional with the expertise in your industry and in the markets throughout the U.S. where you need the assistance the most.

We are working Directors allowing us to provide a higher level of service at a cost effective rate, passing on the savings to you.

FOUNDERS



D. Glenn Williams, CMI
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Mr. Williams has over 20 years of experience in State and Local Property Taxation, primarily with the Big Four professional service firms. During his tenure, he served as the Complex and Industrial Properties Practice Leader for KPMG LLP and Paradigm Tax Group.



Brian Scully, CMI
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Mr. Scully has over 10 years of experience in State and Local Property Taxation both with Big Four professional firms and Industry. During his tenure, he served as a member of the Complex and Industrial team member for KPMG LLP and the Telecommunications Industry Practice Leader for Paradigm Tax Group.



Jeff Talton
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Mr. Talton has over 9 years of experience in State and Local Property Taxation, primarily with the Big Four professional service firms. During his tenure, he has been a Complex and Industrial Properties Practice team member for KPMG LLP, Deloitte and Paradigm Tax Group.

WHY SILVER OAK ADVISORS?

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, impairment issues.

**SILVER OAK ADVISORS
INDUSTRY EXPERTISE AND
SERVICES OFFERED**

Industry Expertise:

Telecommunications
Cable/MSO
Dark Fiber
High-Tech
Paper & Pulp
Automotive
Chemicals
Metals and Mining
Other Manufacturing
Transportation
Healthcare
Publishing
Commercial Real Estate

Services Offered:

Compliance (Proactive, Traditional)
Fixed Asset Inventory and Valuation
Tax Bill Administration
Budget Forecast and Accruals
Real Estate Assessment Appeals
Personal Property Assessment Appeals
Leasing Services
Cost Segregation
Tax Abatement and Credit Reviews
Pre and Post Acquisition Due Diligence
Pollution Control Equipment
Personal Property Audit Defense



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Silver Oak
Advisors, LLC
Financial Solutions that impact your bottom line

TRUSTED Property
Tax Advisors with
over 40 years of
“Big 4” and Industry
experience



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