

# Travis Central Appraisal District



Board of Director's Meeting  
September 11, 2025  
11:30 AM

# TRAVIS CENTRAL APPRAISAL DISTRICT

## BOARD OFFICERS

JAMES VALDEZ  
CHAIRPERSON  
DEBORAH CARTWRIGHT  
VICE CHAIRPERSON  
NICOLE CONLEY  
SECRETARY/TREASURER



LEANA MANN  
CHIEF APPRAISER

## BOARD MEMBERS

JETT HANNA  
JOHN HAVENSTRITE  
DICK LAVINE  
SHENGAO "DANIEL" WANG  
BLANCA ZAMORA-GARCIA

850 East Anderson Lane

Austin, TX 78752 and VIA VIDEOCONFERENCE

The public may hear and view this meeting while in progress online at:

[www.traviscad.org/boardmeetings](http://www.traviscad.org/boardmeetings)

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## AGENDA

### REGULAR MEETING OF THE BOARD OF DIRECTORS - SEPTEMBER 11, 2025 - 11:30 AM

1. CALL TO ORDER
2. ESTABLISHMENT OF A QUORUM
3. CITIZENS COMMUNICATION  
*Public comment will be allowed via teleconference. All public comment will occur at the beginning of the meeting. To speak at this meeting, persons must register online at <https://traviscad.org/speakerregistration> no later than 1.5 hours prior to the meeting start time. Approximately one hour prior to the meeting start time, remote speakers will receive email instructions on how to log in to participate in the meeting. Emails will come from [outreach@tcadcentral.org](mailto:outreach@tcadcentral.org).*
4. CONSENT AGENDA  
*These items may be acted upon by one motion. No separate discussion or vote on any of the items will be held unless requested by a board member.*
  - a. APPROVAL OF THE MINUTES OF THE AUGUST 14, 2025 PUBLIC HEARING, AUGUST 14, 2025 REGULAR MEETING, AND AUGUST 21, 2025 REGULAR MEETING
  - b. SECTION 25.25B REPORT
  - c. ACCOUNTING STATEMENTS
  - d. BUDGET LINE-ITEM TRANSFERS
  - e. PERSONNEL REPORT
5. REGULAR AGENDA
  - a. DISCUSSION AND POSSIBLE ACTION ON TAXPAYER LIAISON OFFICER REPORT
  - b. DISCUSSION AND POSSIBLE ACTION ON APPRAISAL REVIEW BOARD CHAIRMAN REPORT
  - c. DISCUSSION AND POSSIBLE ACTION ON REMOVAL OF APPRAISAL REVIEW BOARD MEMBERS WHO HAVE RESIGNED
  - d. DISCUSSION ON REPORT FROM APPRAISAL REVIEW BOARD COMMITTEE
  - e. DISCUSSION AND POSSIBLE ACTION ON THE NUMBER OF APPRAISAL REVIEW BOARD MEMBERS FOR 2026

- f. DISCUSSION AND POSSIBLE ACTION ON MODIFICATION OF ARB PER DIEM RATES
  - g. DISCUSSION AND POSSIBLE ACTION ON CHIEF APPRAISER REPORT TO INCLUDE: FIELD WORK. 2026 HOMESTEAD VERIFICATION PROJECT, COMMUNITY OUTREACH, TAXPAYER EXPERIENCE SNAPSHOT, AND LEGISLATIVE UPDATE
  - h. DISCUSSION AND POSSIBLE ACTION ON AUTHORIZATION TO PURCHASE HOMESTEAD VERIFICATION PROJECT SUBSCRIPTION THROUGH OMNIA COOPERATIVE PURCHASING CONTRACT NO. 2024056-02
  - i. DISCUSSION AND POSSIBLE ACTION ON PURCHASE OF RESIDENTIAL PROPERTY APPRAISAL SUBSCRIPTION THROUGH OMNIA COOPERATIVE PURCHASING CONTRACT NO. R240303
  - j. DISCUSSION AND POSSIBLE ACTION ON LITIGATION AND APPEALS RELATED TO PENDING AND ANTICIPATED LAWSUITS
6. ADJOURNMENT

**THE BOARD MAY MEET IN EXECUTIVE SESSION TO DELIBERATE ANY MATTER AUTHORIZED BY TEXAS GOVERNMENT CODE SEC. 551.001 et seq [THE TEXAS OPEN MEETING ACT] INCLUDING:**

- SEC. 551.071; Consultation with attorney regarding pending or contemplated litigation, settlement offers, and matters on which the attorney has a duty to advise the Board under the Texas Disciplinary Rules of Professional Conduct of the State Bar of Texas.
- SEC. 551.072; Deliberations regarding real property
- SEC. 551.074; Personnel matters; to deliberate the appointment, employment, evaluation, reassignment, duties, discipline, or dismissal of the Chief Appraiser or other public officer or employee; or to hear a complaint or charge
- SEC. 551.076; Deliberations regarding security devices

The Travis Central Appraisal District is committed to compliance with the Americans with Disabilities Act. Reasonable modifications and equal access to communications will be provided upon request. Please call 512-834-9317 extension 313 for information. For a sign language interpreter, please call 48 hours prior to the meeting.

**CERTIFICATE OF POSTING**

I, Davina Barton, Executive Assistant of the Travis Central Appraisal District, do hereby certify that on the \_\_\_\_\_, by 5 o'clock P.M., this Notice of Meeting was posted at the District's Offices, located at 850 East Anderson Lane, Austin, Texas 78752. This Notice of Meeting was posted in a place readily accessible to the general public at all times for three business days prior to the meeting, filed with the Travis County Clerk for posting by the Clerk at the Travis County Courthouse, and posted on the District's website.

By: *Davina Barton*

Printed Name: Davina Barton

Title: Executive Assistant



## TRAVIS CENTRAL APPRAISAL DISTRICT BOARD OF DIRECTORS AGENDA ITEM DETAILS

**Item** 4: Consent Agenda

**Presenter** Chief Appraiser Leana Mann

### Background Information

The consent agenda is a standing item at each board meeting and includes:

- 4A: Approval of the minutes of the August 14, 2025 and August 21, 2025 regular meetings and August 14, 2025 public hearing
- 4B: Section 25.25B Report
- 4C: Accounting Statements
- 4D: Budget Line-Item Transfers
- 4E: Personnel Report

The consent agenda may be passed with one motion and without any Board discussion. Board members may request that items be pulled from the consent agenda for discussion and/or amendment.

### Staff Recommendation & Motion Language

Staff recommends that all items on the consent agenda be passed.

*I move to pass the items on the consent agenda.*

OR

*I move to pass the items on the consent agenda, without items [list] we pulled for discussion.*

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SHENGHAO "DANIEL" WANG  
BLANCA ZAMORA-GARCIA

## TCAD - BOARD OF DIRECTORS MINUTES OF THE AUGUST 14, 2025 PUBLIC HEARING

### 1. Call to order

Meeting called to order by James Valadez at 11:32 a.m. on August 14, 2025.

### 2. Establishment of Quorum

James Valadez, Chairperson	Appointed	Present
Nicole Conley, Secretary	Appointed	Absent
John Havenstrite	Appointed	Present
Debbie Cartwright	Appointed	Present
Blanca Zamora-Garcia	Appointed	Present
Jett Hanna	Elected, Place 1	Present
Shenghao "Daniel" Wang	Elected, Place 2	Absent
Dick Lavine	Elected, Place 3	Present
Celia Israel	Travis County Tax Assessor-Collector	Absent
James Valadez, Chairperson	Appointed	Present

Also present were Russell Ledbetter, Deputy Chief of Operations, Mike Mills, Deputy Chief Appraiser, and Dustin Banks, Sr. Attorney

### 3. Citizens Communication

No citizens communication.

### 4. Public Hearing on the proposed 2026 Travis Central Appraisal District Budget

- Open Public Hearing
- Receive public comment on 2026 proposed budget.
- Close hearing

RESULT: NOT DISCUSSED – No citizens signed up to discuss the item.

### 6. Adjournment

**MOTION:** Approve to adjourn public hearing at 11:33 a.m.

**RESULT:** APPROVED [UNANIMOUS]

**MOVER:** John Havenstrite

**SECONDER:** Dick Lavine

AYES: James Valadez, Debbie Cartwright, Nicole Conley, Blanca Zamora-Garcia, Dick Lavine, Jett Hanna, John Havenstrite

ABSENT: Celia Israel, Shenghao "Daniel" Wang

Respectfully submitted,

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Nicole Conley, Secretary

Approved:

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James Valadez, Chairperson

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DICK LAVINE  
SHENGHAO "DANIEL" WANG  
BLANCA ZAMORA-GARCIA

## TCAD - BOARD OF DIRECTORS MINUTES OF THE AUGUST 14, 2025 MEETING

### 1. Call to order

Meeting called to order by James Valadez at 11:35 a.m. on August 14, 2025.

### 2. Establishment of Quorum

James Valadez, Chairperson	Appointed	Present
Nicole Conley, Secretary	Appointed	Absent
John Havenstrite	Appointed	Present
Debbie Cartwright	Appointed	Present
Blanca Zamora-Garcia	Appointed	Present
Jett Hanna	Elected, Place 1	Present
Shenghao "Daniel" Wang	Elected, Place 2	Present-Late
Dick Lavine	Elected, Place 3	Present
Celia Israel	Travis County Tax Assessor-Collector	Absent

Also present were Russell Ledbetter, Deputy Chief of Operations, Mike Mills, Deputy Chief Appraiser, and Dustin Banks, Sr. Attorney

### 3. Citizens Communication

- Mark Williams
- Judy Gracey

### 4. Consent Agenda

- APPROVAL OF THE MINUTES OF THE JUNE 12, 2025 REGULAR MEETING
- SECTION 25.25B REPORT
- ACCOUNTING STATEMENTS
- BUDGET LINE-ITEM TRANSFERS
- PERSONNEL REPORT

**MOTION:** Approve the Consent Agenda 4a-4d

**RESULT:** PASSED [UNANIMOUS]

**MOVER:** Jett Hanna

**SECONDER:** Dick Lavine

AYES: James Valadez, Debbie Cartwright, Nicole Conley, Blanca Zamora-Garcia, Dick Lavine, Jett Hanna, John Havenstrite

ABSENT: Celia Israel, Shenghao "Daniel" Wang

**MOTION:** Approve the Consent Agenda 4e  
**RESULT:** **PASSED [UNANIMOUS]**  
**MOVER:** Dick Lavine **SECONDER:** Blanca Zamora-Garcia

AYES: James Valadez, Debbie Cartwright, Nicole Conley, Blanca Zamora-Garcia, Dick Lavine, Jett Hanna, John Havenstrite

ABSENT: Celia Israel, Shenghao "Daniel" Wang

**5A. Discussion and possible action on Taxpayer Liaison Report.**

Members of the board heard from Betty Thompson, Taxpayer Liaison

**RESULT: DISCUSSED**

**5B. Discussion and possible action on Appraisal Review Board Chairman Report.**

Members of the board heard from Barry McBee, Appraisal Review Board Chairman

**RESULT: DISCUSSED**

**5C. Discussion and possible action on removal of Appraisal Review Board Members that have resigned.**

Members of the board heard from Betty Thompson, Taxpayer Liaison

**MOTION:** Move to remove Kimberly Atkins, Faris Bissex, Paula Efferson, Wilfred Navarro and Irv Triegerman, who have formally resigned, from the Appraisal Review Board.  
**RESULT:** **PASSED [UNANIMOUS]**  
**MOVER:** John Havenstrite **SECONDER:** Shenghao "Daniel" Wang

AYES: James Valadez, Debbie Cartwright, Blanca Zamora-Garcia, Dick Lavine, Jett Hanna, John Havenstrite, Shenghao "Daniel" Wang

ABSENT: Nicole Conley, Celia Israel

**5D. Discussion and possible action on Fiscal Year 2026 proposed budget.**

Members of the board heard from Kat Harvey, Director of Administration

**MOTION:** Move to adopt the fiscal year 2026 budget as presented with a total budget amount of \$34,160,900, representing a 5.95% increase over the 2025 adopted budget.  
**RESULT:** **PASSED [UNANIMOUS]**  
**MOVER:** Shenghao “Daniel” Wang **SECONDER:** John Havenstrite

AYES: James Valadez, Debbie Cartwright, Blanca Zamora-Garcia, Dick Lavine, Jett Hanna, John Havenstrite, Shenghao “Daniel” Wang

ABSENT: Nicole Conley, Celia Israel

**5E. Discussion and possible action to include adoption of Texas County and District Retirement System (TCDRS) retirement plan rate for 2026 plan year.**

**MOTION:** Move to table until our next meeting on Thursday, August 21<sup>st</sup>.  
**RESULT:** **PASSED [UNANIMOUS]**  
**MOVER:** Debbie Cartwright **SECONDER:** Shenghao “Daniel” Wang

AYES: James Valadez, Debbie Cartwright, Blanca Zamora-Garcia, Dick Lavine, Jett Hanna, John Havenstrite, Shenghao “Daniel” Wang

ABSENT: Nicole Conley, Celia Israel

**5F. Discussion and possible action on review and adoption of Financial Policy.**

**MOTION:** Move to table until our next meeting on Thursday, August 21<sup>st</sup>.  
**RESULT:** **PASSED [UNANIMOUS]**  
**MOVER:** Debbie Cartwright **SECONDER:** Shenghao “Daniel” Wang

AYES: James Valadez, Debbie Cartwright, Blanca Zamora-Garcia, Dick Lavine, Jett Hanna, John Havenstrite, Shenghao “Daniel” Wang

ABSENT: Nicole Conley, Celia Israel

**5G. Discussion and possible action on Chief Appraiser report to include: 2025 protest season, Community Outreach, Taxpayer Experience Snapshot, and Legislative update.**

**MOTION:** Move to table until our next meeting on Thursday, August 21<sup>st</sup>.  
**RESULT:** **PASSED [UNANIMOUS]**  
**MOVER:** Debbie Cartwright **SECONDER:** Shenghao “Daniel” Wang

AYES: James Valadez, Debbie Cartwright, Blanca Zamora-Garcia, Dick Lavine, Jett Hanna, John Havenstrite, Shenghao “Daniel” Wang

ABSENT: Nicole Conley, Celia Israel

**5H. Discussion and possible action on litigation and appeals related to pending and anticipated lawsuits.**

**MOTION:** Move to table until our next meeting on Thursday, August 21<sup>st</sup>.

**RESULT:** **PASSED [UNANIMOUS]**

**MOVER:** Debbie Cartwright

**SECONDER:** Shenghao “Daniel” Wang

AYES: James Valadez, Debbie Cartwright, Blanca Zamora-Garcia, Dick Lavine, Jett Hanna, John Havenstrite, Shenghao “Daniel” Wang

ABSENT: Nicole Conley, Celia Israel

**5I. Discussion and possible action to authorize the Chief Appraiser to appeal the Appraisal Review Board’s determination on the Tax Year 2025 protest for Property ID 292257.**

**MOTION:** Move to table until our next meeting on Thursday, August 21<sup>st</sup>.

**RESULT:** **PASSED [UNANIMOUS]**

**MOVER:** Debbie Cartwright

**SECONDER:** Shenghao “Daniel” Wang

AYES: James Valadez, Debbie Cartwright, Blanca Zamora-Garcia, Dick Lavine, Jett Hanna, John Havenstrite, Shenghao “Daniel” Wang

ABSENT: Nicole Conley, Celia Israel

**6. Adjournment**

**MOTION:** Move to adjourn

**RESULT:** **PASSED [UNANIMOUS]**

**MOVER:** Blanca Zamora-Garcia

**SECONDER:** Debbie Cartwright

AYES: James Valadez, Debbie Cartwright, Blanca Zamora-Garcia, Dick Lavine, Jett Hanna, John Havenstrite, Shenghao “Daniel” Wang

ABSENT: Nicole Conley, Celia Israel

Respectfully submitted,

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Nicole Conley, Secretary

Approved:

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James Valadez, Chairperson

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 DICK LAVINE  
 SHENGHAO "DANIEL" WANG  
 BLANCA ZAMORA-GARCIA

## TCAD - BOARD OF DIRECTORS MINUTES OF THE AUGUST 21, 2025 MEETING

### 1. Call to order

Meeting called to order by James Valadez at 11:31 a.m. on August 21, 2025.

### 2. Establishment of Quorum

James Valadez, Chairperson	Appointed	Present
Nicole Conley, Secretary	Appointed	Present
John Havenstrite	Appointed	Absent
Debbie Cartwright	Appointed	Present
Blanca Zamora-Garcia	Appointed	Absent
Jett Hanna	Elected, Place 1	Present
Shenghao "Daniel" Wang	Elected, Place 2	Present-Late
Dick Lavine	Elected, Place 3	Present
Celia Israel	Travis County Tax Assessor-Collector	Present-Late

Also present were Leana Mann, Chief Appraiser, Dustin Banks, Sr. Attorney, and Karen Evertson

### 3. Citizens Communication

#### 4A. Discussion and possible action to include adoption of Texas County and District Retirement System (TCDRS) retirement plan rate for 2026 plan year.

**MOTION:** Move to adopt the plan year 2026 agreement as presented with a required contribution rate of 10.94%.

**RESULT:** **PASSED [UNANIMOUS]**

**MOVER:** Debbie Cartwright

**SECONDER:** Dick Lavine

**AYES:** James Valadez, Debbie Cartwright, Nicole Conley, Dick Lavine, Jett Hanna

**ABSENT:** Blanca Zamora-Garcia, Celia Israel, John Havenstrite, Shenghao "Daniel" Wang

**4B. Discussion and possible action on review and adoption of Financial Policy.**

Members of the board heard from Kat Harvey, Director of Administration

**MOTION:** Move to adopt the Travis CAD finance policy effective September 1, 2025  
**RESULT:** **PASSED [UNANIMOUS]**  
**MOVER:** Shenghao “Daniel” Wang **SECONDER:** Nicole Conley

AYES: James Valadez, Debbie Cartwright, Nicole Conley, Celia Israel, Dick Lavine, Jett Hanna, Shenghao “Daniel” Wang

ABSENT: Blanca Zamora-Garcia, John Havenstrite,

**4C. Discussion and possible action on Chief Appraiser report to include: 2025 protest season, Community Outreach, Taxpayer Experience Snapshot, and Legislative update.**

Members of the board heard from Leana Mann, Chief Appraiser

**RESULT:** **DISCUSSED**

**At 11:50 A.M. All THE BOARD moved to executive session; TO DELIBERATE ON ANY MATTER AUTHORIZED BY TEXAS GOVERNMENT CODE SEC. 551.001 et seq [THE TEXAS OPEN MEETING ACT] INCLUDING:**

SEC. 551.071; Consultation with attorney regarding pending or contemplated litigation, settlement offers and matters on which the attorney has a duty to advise the Board under the Texas Disciplinary Rules of Professional Conduct of the State Bar of Texas.

**MOTION:** Move to enter Executive Session  
**RESULT:** **PASSED [UNANIMOUS]**  
**MOVER:** Shenghao “Daniel” Wang **SECONDER:** Dick Lavine

AYES: James Valadez, Debbie Cartwright, Nicole Conley, Celia Israel, Dick Lavine, Jett Hanna, Shenghao “Daniel” Wang

ABSENT: Blanca Zamora-Garcia, John Havenstrite

**4D. Discussion and possible action on litigation and appeals related to pending and anticipated lawsuits.**

**RESULT:** **DISCUSSED IN EXECUTIVE SESSION**

At 1:58 PM, the Board resumed the public session and returned to Item 4E.

**4E. Discussion and possible action to authorize the Chief Appraiser to appeal the Appraisal Review Board's determination on the Tax Year 2025 protest for Property ID 292257.**

**MOTION:** Move that the Board of Directors pass and approve Resolution 20250821-4E, giving the Chief Appraiser written approval to appeal the tax year 2025 ARB's order for Property ID 292257 as discussed in Executive Session.

**RESULT: PASSED**

**MOVER:** Shenghao "Daniel" Wang

**SECONDER:** Celia Israel

AYES: James Valadez, Nicole Conley, Celia Israel, Dick Lavine, Shenghao "Daniel" Wang

NAYS: Debbie Cartwright, Jett Hanna

ABSENT: Blanca Zamora-Garcia, John Havenstrite

**5F. Adjournment**

**MOTION:** Move to adjourn

**RESULT: PASSED [UNANIMOUS]**

**MOVER:** Shenghao "Daniel" Wang

**SECONDER:** Celia Israel

AYES: James Valadez, Debbie Cartwright, Nicole Conley, Celia Israel, Dick Lavine, Jett Hanna, Shenghao "Daniel" Wang

ABSENT: Blanca Zamora-Garcia, John Havenstrite

Respectfully submitted,

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Nicole Conley, Secretary

Approved:

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James Valadez, Chairperson

PID	Year	Owner Name	Legal Description	Location	Initial Market Value	Current Market Value
393220	2024	CONLEY CARL	PERSONAL PROPERTY COMMERCIAL CONLEY ENGINEERING INC	1309 WILDERNESS DR, AUSTIN TX 78746	\$182	\$0
CLOSED 2/22 PER 2024 REND. CORRECTION TO \$0 & INACTIVATE. DDH 9/10/2024						
456627	2025	LI NA	LOT 4 BLK B RIVER PLACE SEC 21	4700 RIVER PLACE BLVD 4, TX 78730	\$1,258,608	\$1,177,680
REMOVED POOL/SPA WAS ADDED IN ERROR IN 2022 PER ZSD 8/26/2025						
456627	2024	LI NA	LOT 4 BLK B RIVER PLACE SEC 21	4700 RIVER PLACE BLVD 4, TX 78730	\$1,400,204	\$1,277,686
REMOVED POOL/SPA WERE ADDED IN ERROR IN 2022 PER ZSD 8/26/2025						
456627	2023	LI NA	LOT 4 BLK B RIVER PLACE SEC 21	4700 RIVER PLACE BLVD 4, TX 78730	\$1,577,104	\$1,370,175
REMOVED POOL/SPA WERE ADDED IN ERROR IN 2022 PER ZSD 8/26/2025						
485344	2025	BUCHANAN J STUART &	ABS 341 SUR 35 HAILEY R ACR 5.3870	8922 APPALOOSA RUN, TX 78737	\$579,544	\$531,215
AC CORR PER REVIEW OF DEED HISTORY						
746732	2024	SENS TIMOTHY	PERSONAL PROPERTY COMMERCIAL SENS TIMOTHY	2401 E 6 ST 2018, AUSTIN TX 78702	\$500	\$0
PER '24 RENDITION BUSINESS CLOSED 06/2023, RECOMMENDING ADJUST VALUE TO \$0 AND INACTIVATING ACCOUNT FOR 2024- MJM 09/05/24						
793394	2024	H20 HUMMERS LLC	PERSONAL PROPERTY COMMERCIAL H20 HUMMERS LLC	11913 SNOW FINCH RD, AUSTIN TX 78758	\$707	\$0
PER '24 REND AND SOS BUSINESS CLOSED AS OF 08/11/23, RECOMMENDING ADJUSTING VALUE TO \$0 AND INACTIVATING ACCOUNT FOR 2024 - MJM 09/05/24						
819370	2024	AUSTIN HARMONY PROJECT INC	PERSONAL PROPERTY COMMERCIAL AUSTIN HARMONY PROJECT INC	1806 W STASSNEY LN 106, TX 78745	\$10,146	\$0
PER CHANGE FOR BUSINESS MOVED OUTSIDE OF TRAVIS COUNTY TO HAYS COUNTY AS OF 11/01/2023, RECOMMEND ADJUSTING VALUE TO \$0 AND INACTIVATING ACCOUNT FOR 2024 - MJM 09/18/24						
886498	2022	GRANT YVONNA KAY MARIE &	RIVER RANCH MH PARK, SPACE 690, SN1 CSS017255TXA; SN2 CSS017255TXB; HUD# HWC0444684; HUD#2 HWC0444685	13021 DESSAU RD 690, AUSTIN TX 78754	\$128,776	\$0
MOBILE HOME SOLD IN 2021 PER STATEMENT OF OWNERSHIP. 7/8/2025 RCJ						
944424	2021	GEHAN HOMES LTD	LOT 22 BLK D CARMEL WEST PHS 3 SEC 1	6712 GOLDEN BOUGH LN LN, TX 78660	\$50,000	\$50,000
UPDATE OWNERSHIP						
944440	2021	GEHAN HOMES LTD	LOT 21 BLK E CARMEL WEST PHS 3 SEC 1	6713 GOLDEN BOUGH LN LN, TX 78660	\$50,000	\$50,000
UPDATE OWNERSHIP						
944536	2021	GEHAN HOMES LTD	LOT 10 BLK D CARMEL WEST PHS 3 SEC 1	6521 FOLSOM AVE, TX 78660	\$50,000	\$50,000
UPDATE OWNERSHIP						

PID	Year	Owner Name	Legal Description	Location	Initial Market Value	Current Market Value
944540	2021	GEHAN HOMES LTD	LOT 1 BLK E CARMEL WEST PHS 3 SEC 1	6401 GOLDEN BOUGH LN, TX 78660	\$50,000	\$50,000
UPDATE OWNERSHIP						
950552	2025	LIMESTONE REALTY GROUP	PERSONAL PROPERTY COMMERCIAL LOUISE BELL REALTY	9600 GREAT HILLS TRL 150W, AUSTIN TX 78759	\$23,850	\$23,850
PER 2024 APPEAL UPDATE SITUS TO 9600 GREAT HILLS TRL STE 150W AUSTIN TX 78759, NO CHANGE TO VALUE - MJM 07/31/25						
952679	2024	EXPEDIA INC	PERSONAL PROPERTY COMMERCIAL EXPEDIA INC	11920 ALTERRA PARKWAY, AUSTIN TX 78758	\$41	\$1,159,869
PER CLERICAL DATA ENTRY ERROR ADJUSTING VALUE FROM \$41.00 TO RENDERED \$1,159,869 PER 2024 RENDITION - MJM 01/10/25						
975779	2023	JUAREZ RAMON & AMELIA GARCIA	PERSONAL PROPERTY MH S# BL2004651TXA/B L# NTA1927852/53	11632 DOYLE OVERTON RD, AUSTIN TX 78719	\$96,034	\$0
MOBILE HOME DUPLICATING PID# 950597, REMOVING FOR 2023-2025. 7/24/2025 RCJ						
988294	2024	CRAIN RENVIE & JOHN MCFADYEN	PERSONAL PROPERTY MH 2019 SN1-PHH320TX1927261A SN2-PHH320TX1927261B; HUD1-PFS1227208 HUD2-PFS1227209	11411 RICHLAND RD, COUPLAND TX 78615	\$151,761	\$0
MOBILE HOME ALREADY VALUED ON REAL PROPERTY FOR TAX YEAR. NEED TO REMOVE DUPLICATION. 7/8/2025 RCJ						

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CHIEF APPRAISER

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BLANCA ZAMORA-GARCIA

TO: Travis Central Appraisal District  
Board of Directors

FROM: Kat Harvey  
Director of Administration

SUBJECT: July 2025 Unaudited Financial Statements

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The unaudited financial statements for July 2025 are enclosed. Financial highlights for the month are as follows:

- The District's ending fund balance was \$8,135,503. Of that, \$317,630 was nonspendable in the form of prepaid expenditures, \$2,489,370 was held in reserves as committed fund balance, and \$5,328,503 was unassigned fund balance.
- *The net change in fund balance for the fiscal year to date is \$3,265,769*
- The reserve balances total \$2,489,370. Detail account balances for each reserve account are as follows:

	<u>Current Balance</u>
Reserve for Computer Equipment	\$ 89,594
Reserve for Network Infrastructure	\$ 350,000
Reserve for Technology Enhancements	\$ 154,192
Reserve for Litigation	\$ 1,176,030
Reserve for Building Repair & Replacement	\$ -
Reserve for ARB Operations	\$ -
Reserve for Market Data Purchases	\$ 150,000
Reserve for Board Elections	\$ 569,554
	<u>\$ 2,489,370</u>

- ***The District ended the month with a budget surplus of \$1,928,242.***
- 850 EAL Holding Corp. is considered a blended component unit of the District. This component unit is reported in the financial statements as a Special Revenue Fund on the Governmental Funds Balance Sheet and Statement of Revenue, Expenditures and Changes in Fund Balance.

**Travis Central Appraisal District**  
 Budget to Actual- Governmental Funds  
 For the month ended July 31, 2025

	Budgeted Amounts			Actual Amounts	Variance Fav (Unfav)
	Original	Amended	YTD		
<b>REVENUE:</b>					
Appraisal assessments	32,241,352	32,241,352	18,807,455	18,807,456	0
Refund of appraisal assessments	-	-	-	-	-
<b>Net appraisal assessments</b>	<b>\$ 32,241,352</b>	<b>\$ 32,241,352</b>	<b>\$ 18,807,455</b>	<b>\$ 18,807,456</b>	<b>\$ 0</b>
Investment earnings	150,000	150,000	87,500	296,553	209,053
Charges for services	9,000	9,000	5,250	2,803	(6,197)
Miscellaneous revenue	50,000	50,000	29,167	69,827	19,827
<b>TOTAL REVENUE</b>	<b>\$ 32,450,352</b>	<b>\$ 32,450,352</b>	<b>\$ 18,929,372</b>	<b>\$ 19,176,639</b>	<b>\$ 222,684</b>
<b>EXPENDITURES:</b>					
ARB Per diem payments	1,173,125	1,173,125	684,323	522,698	161,625
Personnel Cost	12,488,321	12,436,870	7,254,841	7,393,664	(138,823)
Benefit Cost	5,568,186	5,102,714	2,976,583	2,731,855	244,728
Printing and mailing services	665,200	730,200	425,950	516,408	(90,458)
Operating supplies	248,183	226,495	132,122	114,352	17,770
Subscriptions and data purchases	340,720	395,590	230,761	274,818	(44,057)
Training and education	162,666	155,940	90,965	68,788	22,177
Travel expenditures	41,327	48,850	28,496	12,424	16,072
Utilities	495,800	543,610	317,106	234,885	82,221
Legal expenditures	3,625,000	2,058,100	1,200,558	731,006	469,553
Professional services	4,033,256	4,160,186	2,426,775	1,422,103	1,004,672
Insurance	110,678	90,178	52,604	54,335	(1,731)
Aerial photography	657,650	574,810	335,306	496,393	(161,087)
Rentals	154,320	152,820	89,145	80,285	8,860
Building and Equipment maintenance	463,289	346,190	201,944	183,037	18,907
Software maintenance	430,627	350,467	204,439	292,254	(87,815)
Other services	396,116	466,557	272,158	256,758	15,400
Capital Outlay	438,050	438,050	255,529	150,389	105,140
Debt Service- Principal	654,742	654,742	381,933	338,071	43,862
Debt Service- Interest	94,096	94,096	54,889	36,348	18,541
<b>TOTAL EXPENDITURES</b>	<b>32,241,352</b>	<b>30,199,590</b>	<b>17,616,428</b>	<b>15,910,870</b>	<b>1,705,557</b>
<b>EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES</b>	<b>209,000</b>	<b>2,250,762</b>	<b>1,312,945</b>	<b>3,265,769</b>	<b>1,928,242</b>
<b>OTHER FINANCING SOURCES (USES):</b>					
Transfers In	-	-	-	374,419	(374,419)
Transfers out	-	-	-	(374,419)	374,419
<b>TOTAL OTHER FINANCING SOURCES (USES)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
NET CHANGE IN FUND BALANCE	209,000	2,250,762	1,312,945	3,265,769	1,928,242
Beginning Fund Balance	4,869,734	4,869,734	4,869,734	4,869,734	
Ending Fund Balance	<b>\$ 5,078,734</b>	<b>\$ 7,120,496</b>	<b>\$ 6,182,679</b>	<b>\$ 8,135,503</b>	<b>\$ 1,928,242</b>

# Travis Central Appraisal District

## Governmental Fund Balance Sheet

July 31, 2025

	<b>General Fund</b>	<b>Special Revenue Fund</b>	<b>Total Governmental Funds</b>
<b>ASSETS</b>			
Cash and cash equivalents	9,702,547	-	9,702,547
Short-term investments	4,399,577	-	4,399,577
Receivables	109,730	-	109,730
Prepaid items	317,630	-	317,630
<b>TOTAL ASSETS</b>	<b><u>\$ 14,529,484</u></b>	<b><u>\$ -</u></b>	<b><u>\$ 14,529,484</u></b>
<b>LIABILITIES</b>			
Accounts payable and accrued expenditures	1,020,422	-	1,020,422
Unearned revenue	5,373,559	-	5,373,559
<b>TOTAL LIABILITIES</b>	<b>6,393,981</b>	<b>-</b>	<b>6,393,981</b>
<b>FUND BALANCES</b>			
Fund balance, committed	2,489,370	-	2,489,370
Fund Balance, restricted	-	-	-
Fund balance, nonspendable	317,630	-	317,630
Fund balance, unassigned	5,328,503	-	5,328,503
<b>TOTAL FUND BALANCES</b>	<b><u>8,135,503</u></b>	<b><u>-</u></b>	<b><u>8,135,503</u></b>
<b>TOTAL LIABILITIES AND FUND BALANCE</b>	<b><u>\$ 14,529,484</u></b>	<b><u>\$ -</u></b>	<b><u>\$ 14,529,484</u></b>

## Travis Central Appraisal District

Statement of Revenues, Expenditures and Changes in Fund Balance

For the month ended July 31, 2025

	<u>General Fund</u>	<u>Special Revenue Fund</u>	<u>Total Governmental Funds</u>
<b>REVENUES</b>			
Appraisal assessments	\$ 18,807,456	\$ -	\$ 18,807,456
Refund of appraisal assessments	-	-	-
<b>Net appraisal assessments</b>	<u>18,807,456</u>	<u>-</u>	<u>18,807,456</u>
Investment earnings	296,553	-	296,553
Charges for services	2,803	-	2,803
Miscellaneous revenue	69,827	-	69,827
<b>TOTAL REVENUE</b>	<u>19,176,639</u>	<u>-</u>	<u>19,176,639</u>
<b>EXPENDITURES</b>			
Appraisal services			
Payroll and related expenditures	10,648,217	-	10,648,217
Data processing	292,254	-	292,254
Transportation	12,424	-	12,424
Operating supplies	114,352	-	114,352
Rentals	80,285	-	80,285
Legal and professional	2,153,109	-	2,153,109
Utilities and telephone	234,885	-	234,885
Building and equipment maintenance	183,037	-	183,037
Insurance	54,335	-	54,335
Other services	1,613,165	-	1,613,165
Capital outlay	150,389	-	150,389
Debt Service- Principal	-	338,071	338,071
Debt Service- Interest	-	36,348	36,348
<b>TOTAL EXPENDITURES</b>	<u>15,536,451</u>	<u>374,419</u>	<u>15,910,870</u>
<b>EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES</b>	3,640,188	(374,419)	3,265,769
<b>OTHER FINANCING SOURCES (USES):</b>			
Transfers in	-	374,419	374,419
Transfers out	(374,419)	-	(374,419)
<b>TOTAL OTHER FINANCING SOURCES (USES)</b>	<u>(374,419)</u>	<u>374,419</u>	<u>-</u>
<b>NET CHANGE IN FUND BALANCE</b>	3,265,769	-	3,265,769
<b>FUND BALANCE, beginning of year</b>	<u>4,869,734</u>	<u>-</u>	<u>4,869,734</u>
<b>FUND BALANCE, end of year</b>	<u>\$ 8,135,503</u>	<u>\$ -</u>	<u>\$ 8,135,503</u>

Travis Central Appraisal District

# Investment Report

As of July 31, 2025



**M E E D E R**

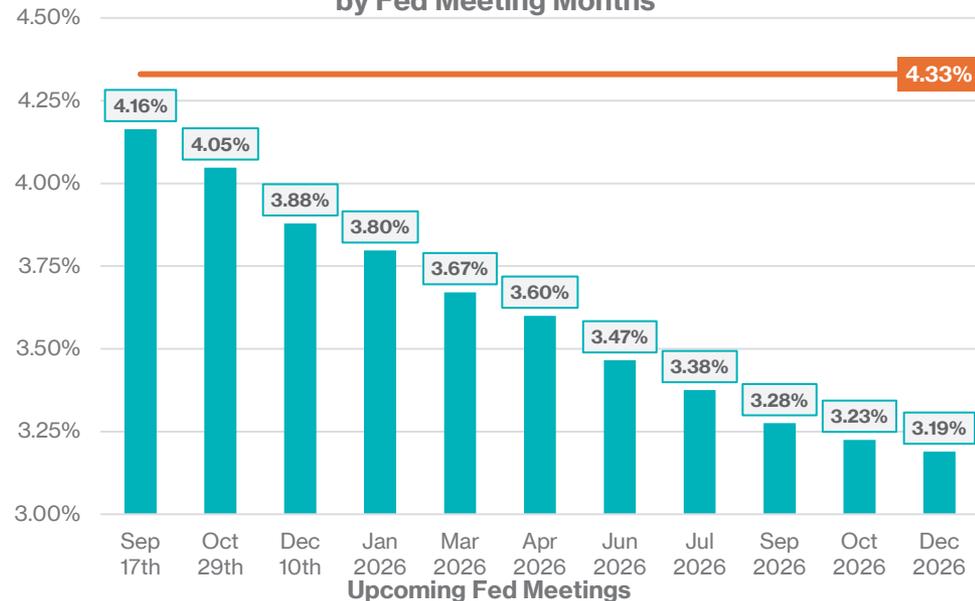
**PUBLIC FUNDS**

# OBSERVATIONS AND EXPECTATIONS

- GDP rebounded in Q2 to 3.0% from the tariff-induced decline of -0.5% in Q1
- The Fed held rates steady at the July FOMC meeting, projecting two cuts later this year
- The labor market continues to be solid with the unemployment rate below average
- Trade/tariff tensions continue to weigh on business investment and sentiment
- The Fed's favored inflation metric (Core PCE) ticked higher in July to 2.8% YoY
- Interest rates across the yield curve were higher for the month of July

- The Fed Funds futures market is expecting a .25% cut in October and then about another three cuts next year.
- The Fed has stated they've been reluctant to lower rates this year due to tariff uncertainty.

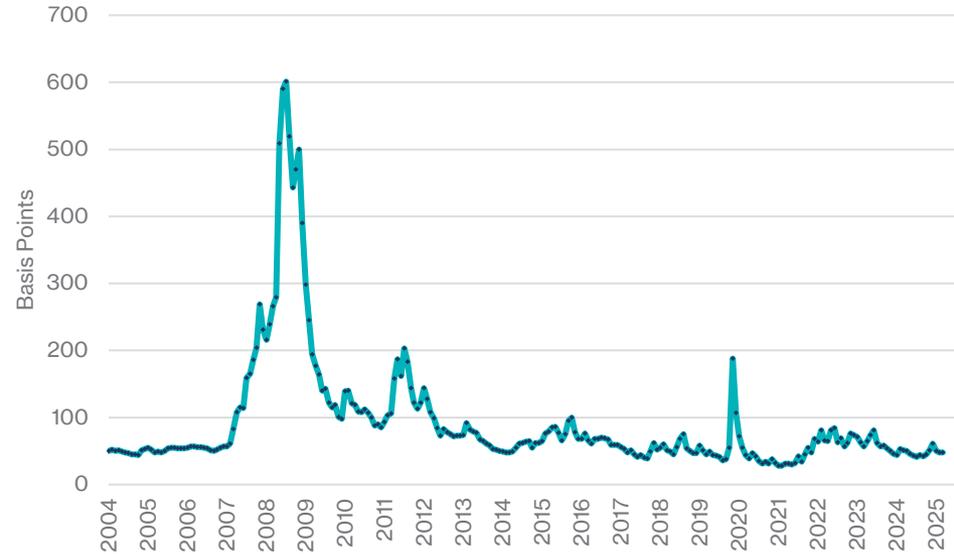
2025-26 Fed Funds Rate Per Futures Market  
by Fed Meeting Months



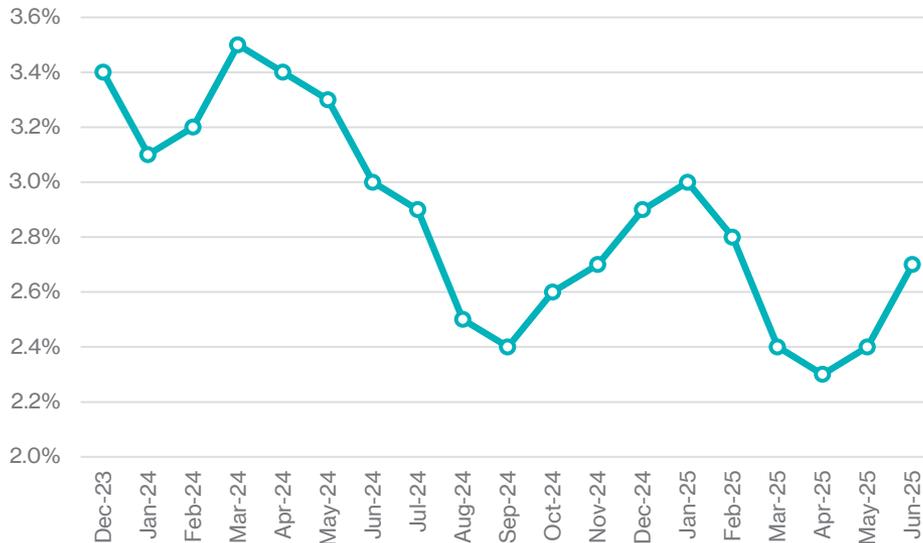
- Corporate bond spreads, the difference in yield between corporate bonds and U.S. Treasury securities, are a barometer of the economy, with wider spreads suggesting increased risk and economic uncertainty, while narrower spreads indicate stability and investor confidence.
- Corporate spreads are currently showing little signs of economic concern.

SOURCES: BLOOMBERG

### 1-5 Yr A-AAA Rated Corporate Bonds Spread to Treasuries



### CPI YoY

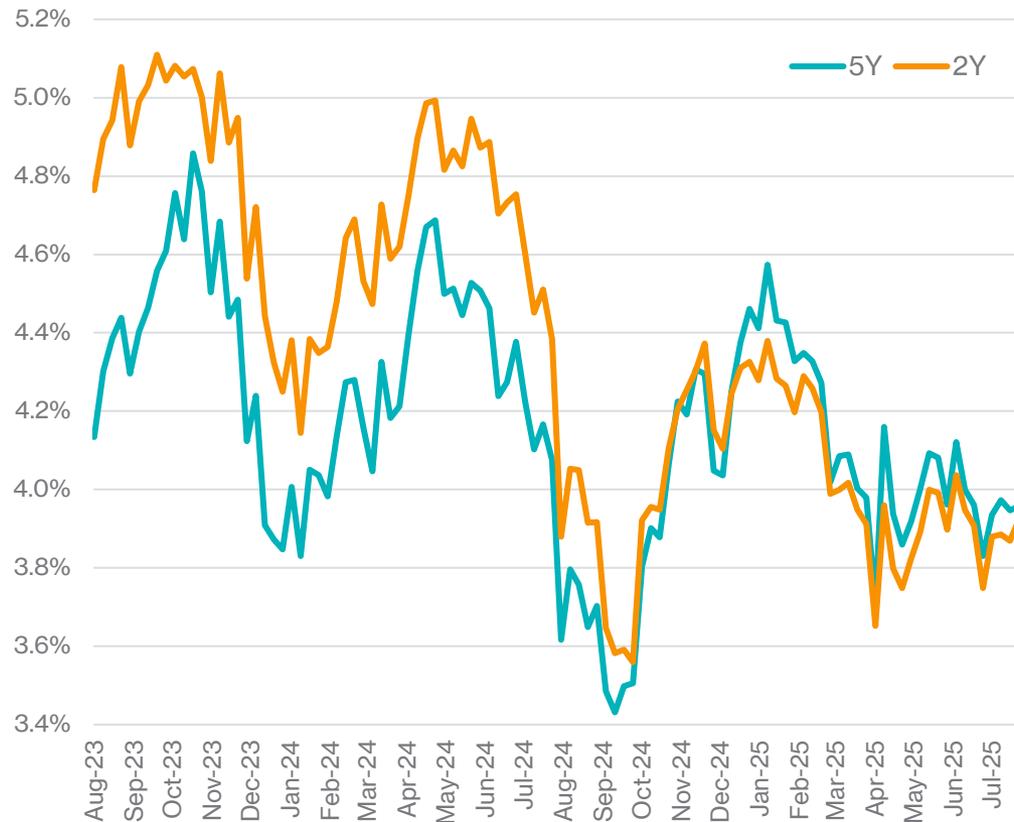


- Inflation has been trending higher since earlier this year.
- Bloomberg’s survey of economists predict inflation will keep rising because of the expected tariff impacts later this year.

SOURCES: BLOOMBERG

- Both the 2-year and 5-year U.S. Treasury rates had their cycle peaks in October 2023 at 5.22% and 4.96%, respectively.
- The Federal Reserve executed the first rate cut of this cycle in September 2024.
- Typically, the 2-year and 5-year Treasury yields are lower 9 months after the first cut of a cycle, but not this time.
- Market participants are most likely demanding higher rates due to future inflation uncertainty caused by tariffs.

**2Y and 5Y U.S. Treasury Rates**



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Accrued Interest Schedule	13
Earnings by Fund	14



## Portfolio Summary

**4.15**

Weighted Average Yield to Maturity

**0.00**

Weighted Average Maturity (Years)

**0.00**

Portfolio Effective Duration (Years)

**0.00**

Weighted Average Life (Years)

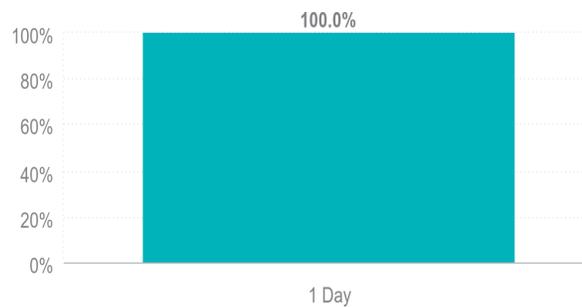
**AAA**

Average Credit Rating

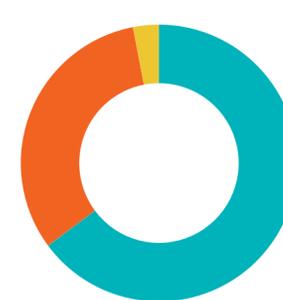
## Portfolio Position

<b>Par Value</b>	\$13,689,680
<b>Principal Cost</b>	\$13,689,680
<b>Book Value</b>	\$13,689,680
<b>Market Value</b>	\$13,689,680
<b>Unrealized Gain/Loss</b>	\$0
<b>Accrued Interest</b>	\$0

## Maturity Distribution



## Sector Allocation



# Portfolio Overview

SECURITY TYPE	PAR VALUE	MARKET VALUE	BOOK VALUE	% OF PORTFOLIO	DAYS TO MATURITY	YIELD
Bank Deposits	413,231.61	413,231.61	413,231.61	3.02%	1	0.68
LGIP	4,399,576.89	4,399,576.89	4,399,576.89	32.14%	1	4.39
Money Market Funds	8,876,871.23	8,876,871.23	8,876,871.23	64.84%	1	4.19
<b>TOTAL</b>	<b>13,689,679.73</b>	<b>13,689,679.73</b>	<b>13,689,679.73</b>	<b>100.00%</b>	<b>1</b>	<b>4.15</b>
<b>CASH AND ACCRUED INTEREST</b>						
Purchased Accrued Interest		0.00	0.00			
<b>TOTAL CASH AND INVESTMENTS</b>	<b>13,689,679.73</b>	<b>13,689,679.73</b>	<b>13,689,679.73</b>		<b>1</b>	<b>4.15</b>
<b>TOTAL EARNINGS</b>						
		<b>CURRENT MONTH</b>				
		41,611.91				

## Summary by Type

SECURITY TYPE	# OF SECURITIES	PAR VALUE	BOOK VALUE	% OF PORTFOLIO	YIELD	DAYS TO FINAL MATURITY
<b>GENERAL FUND</b>						
Bank Deposits	2	413,231.61	413,231.61	3.02	0.68	1
LGIP	2	4,399,576.89	4,399,576.89	32.14	4.39	1
Money Market Funds	1	8,876,871.23	8,876,871.23	64.84	4.19	1
<b>TOTAL</b>	<b>5</b>	<b>13,689,679.73</b>	<b>13,689,679.73</b>	<b>100.00</b>	<b>4.15</b>	<b>1</b>
<hr/>						
<b>GRAND TOTAL</b>	<b>5</b>	<b>13,689,679.73</b>	<b>13,689,679.73</b>	<b>100.00</b>	<b>4.15</b>	<b>1</b>



## Position Statement

CUSIP	DESCRIPTION	TRADE DATE SETTLE DATE	PAR VALUE	PRINCIPAL COST PURCHASED INTEREST	TOTAL COST	YIELD TO MATURITY	MATURITY DATE	DAYS TO MATURITY	MARKET PRICE MARKET VALUE	UNREALIZED GAIN/LOSS BOOK VALUE	% OF MV	MOODY'S S&P RATING
<b>GENERAL FUND</b>												
<b>BANK DEPOSITS</b>												
6224690401	Wells Fargo Analyzed Bus Chkg+	07/31/2025 07/31/2025	413,126.25	413,126.25 0.00	413,126.25	0.68		1	1.00 413,126.25	0.00 413,126.25	3.02	NA NA
7556188469	Wells Fargo Analyzed Bus Chkg+	07/31/2025 07/31/2025	105.36	105.36 0.00	105.36	0.68		1	1.00 105.36	0.00 105.36	0.00	NA NA
<b>BANK DEPOSITS TOTAL</b>			<b>413,231.61</b>	<b>413,231.61 0.00</b>	<b>413,231.61</b>	<b>0.68</b>		<b>1</b>	<b>1.00 413,231.61</b>	<b>0.00 413,231.61</b>	<b>3.02</b>	<b>NA</b>
<b>LGIP</b>												
TEXPOOL	TexPool	07/31/2025 07/31/2025	1,588,794.61	1,588,794.61 0.00	1,588,794.61	4.33		1	1.00 1,588,794.61	0.00 1,588,794.61	11.61	AAA
TEXPRIME	TexPool Prime	07/31/2025 07/31/2025	2,810,782.28	2,810,782.28 0.00	2,810,782.28	4.43		1	1.00 2,810,782.28	0.00 2,810,782.28	20.53	AAA
<b>LGIP TOTAL</b>			<b>4,399,576.89</b>	<b>4,399,576.89 0.00</b>	<b>4,399,576.89</b>	<b>4.39</b>		<b>1</b>	<b>1.00 4,399,576.89</b>	<b>0.00 4,399,576.89</b>	<b>32.14</b>	<b>AAA</b>
<b>MONEY MARKET FUNDS</b>												
7556188477S	Wells Fargo Stage- coach Sweep	07/31/2025 07/31/2025	8,876,871.23	8,876,871.23 0.00	8,876,871.23	4.19		1	1.00 8,876,871.23	0.00 8,876,871.23	64.84	NA NA
<b>MONEY MARKET FUNDS TOTAL</b>			<b>8,876,871.23</b>	<b>8,876,871.23 0.00</b>	<b>8,876,871.23</b>	<b>4.19</b>		<b>1</b>	<b>1.00 8,876,871.23</b>	<b>0.00 8,876,871.23</b>	<b>64.84</b>	<b>NA</b>
<b>GENERAL FUND TOTAL</b>			<b>13,689,679.73</b>	<b>13,689,679.73 0.00</b>	<b>13,689,679.73</b>	<b>4.15</b>		<b>1</b>	<b>13,689,679.73</b>	<b>0.00 13,689,679.73</b>	<b>100.00</b>	<b>AAA</b>
<b>GRAND TOTAL</b>			<b>13,689,679.73</b>	<b>13,689,679.73 0.00</b>	<b>13,689,679.73</b>	<b>4.15</b>		<b>1</b>	<b>13,689,679.73</b>	<b>0.00 13,689,679.73</b>	<b>100.00</b>	<b>AAA</b>



## Cash Reconciliation Report

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## Transaction Statement

**NO ACTIVITY DURING  
CURRENT PERIOD**

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## Amortization Schedule

CUSIP	DESCRIPTION	PAR VALUE	PRINCIPAL COST	ORIGINAL PREMIUM OR DISCOUNT	BEGINNING BOOK VALUE	CURRENT PERIOD AMORT	ENDING BOOK VALUE	TOTAL AMORTIZATION	UNAMORTIZED BALANCE
<b>GRAND TOTAL</b>		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

## Accrued Interest Schedule

IDENTIFIER	DESCRIPTION	SETTLE DATE	PAR VALUE	PRINCIPAL COST	BEGINNING ACCRUED INTEREST	PURCHASED INTEREST	CURRENT PERIOD ACCRUAL	INTEREST RECEIVED	ENDING ACCRUED INTEREST
<b>GENERAL FUND</b>									
TEXPOOL	TexPool	2025-07-31	1,588,794.61	1,588,794.61	0.00	0.00	5,797.35	5,797.35	0.00
TEXPRIME	TexPool Prime	2025-07-31	2,810,782.28	2,810,782.28	0.00	0.00	10,510.82	10,510.82	0.00
6224690401	Wells Fargo Analyzed Bus Chkg+	2025-07-31	413,126.25	413,126.25	0.00	0.00	238.37	238.37	0.00
7556188469	Wells Fargo Analyzed Bus Chkg+	2025-07-31	105.36	105.36	0.00	0.00	5.67	5.67	0.00
7556188477S	Wells Fargo Stagecoach Sweep	2025-07-31	8,876,871.23	8,876,871.23	0.00	0.00	25,059.70	25,059.70	0.00
<b>TOTAL</b>			<b>13,689,679.73</b>	<b>13,689,679.73</b>	<b>0.00</b>	<b>0.00</b>	<b>41,611.91</b>	<b>41,611.91</b>	<b>0.00</b>
<b>GRAND TOTAL</b>			<b>13,689,679.73</b>	<b>13,689,679.73</b>	<b>0.00</b>	<b>0.00</b>	<b>41,611.91</b>	<b>41,611.91</b>	<b>0.00</b>



## Earnings by Fund

CUSIP	DESCRIPTION	ENDING PAR VALUE	BEGINNING BOOK VALUE	ENDING BOOK VALUE	FINAL MATURITY	COUPON RATE	YIELD	INTEREST EARNED	NET AMORTIZATION/ ACCRETION INCOME	NET REALIZED GAIN/LOSS	ADJUSTED INTEREST EARNINGS
<b>GENERAL FUND</b>											
6224690401	Wells Fargo Analyzed Bus Chkg+	413,126.25	410,247.39	413,126.25	07/31/2025	1.00	0.68	238.37	0.00	0.00	238.37
7556188469	Wells Fargo Analyzed Bus Chkg+	105.36	99.69	105.36	07/31/2025	1.00	0.68	5.67	0.00	0.00	5.67
7556188477S	Wells Fargo Stagecoach Sweep	8,876,871.23	10,910,988.20	8,876,871.23	07/31/2025	0.00	4.19	25,059.70	0.00	0.00	25,059.70
TEXPOOL	TexPool	1,588,794.61	1,582,997.26	1,588,794.61	07/31/2025	5.34	4.33	5,797.35	0.00	0.00	5,797.35
TEXPRIME	TexPool Prime	2,810,782.28	2,800,271.46	2,810,782.28	07/31/2025	4.50	4.43	10,510.82	0.00	0.00	10,510.82
<b>TOTAL</b>		<b>13,689,679.73</b>	<b>15,704,604.00</b>	<b>13,689,679.73</b>		<b>1.57</b>	<b>4.15</b>	<b>41,611.91</b>	<b>0.00</b>	<b>0.00</b>	<b>41,611.91</b>
<b>GRAND TOTAL</b>		<b>13,689,679.73</b>	<b>15,704,604.00</b>	<b>13,689,679.73</b>		<b>1.57</b>	<b>4.15</b>	<b>41,611.91</b>	<b>0.00</b>	<b>0.00</b>	<b>41,611.91</b>

## Disclosure

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**Travis Central Appraisal District**  
**A/R- Jurisdiction Outstanding Invoices - Month End Reconciliation (10410)**  
**Through September 4, 2025**

Customer ID	Customer Name	Due Date	Number	Invoice Date	Invoice Description	Total
4N	PILOT KNOB MUD NO 4	8/23/2025	9310	7/24/2025	Q1 & Q2 2025 - Late Fees	9.91
						<b><u>9.91</u></b>

**Travis Central Appraisal District**  
Statement of Revenues and Expenditures  
01 - ARB  
From 1/1/2025 Through 8/31/2025

	Total Budget Amended	YTD Budget	Actual	Budget Variance	Percent of Total Budget Final
Expenditures					
Per Diem Expenditures					
Per Diem Payments	1,173,125.00	782,083.36	744,115.00	37,968.36	36.56%
Total Per Diem Expenditures	1,173,125.00	782,083.36	744,115.00	37,968.36	36.57%
Supplies					
Operating Supplies	5,000.00	3,333.36	2,911.04	422.32	41.77%
Total Supplies	5,000.00	3,333.36	2,911.04	422.32	41.78%
Services					
Training & Education	10,000.00	6,666.64	2,850.00	3,816.64	71.50%
Attorney & Court Costs	35,000.00	23,333.36	15,921.25	7,412.11	54.51%
Total Services	45,000.00	30,000.00	18,771.25	11,228.75	58.29%
Total Expenditures	1,223,125.00	815,416.72	765,797.29	49,619.43	37.39%
Excess (Deficiency) of Revenues over (Under) Expenditures	(1,223,125.00)	(815,416.72)	(765,797.29)	(49,619.43)	37.39%

## Travis Appraisal Review Board Cost per Hearing- 2025

ARB Expenditures through 08/31/2025	\$ 765,797.29
Number of ARB Hearings 1/1/2025-8/31/2025 <i>(excludes topline agreements)</i>	24,181
<b>FY 2025 Cost per Hearing</b>	<b>\$ 31.67</b>
<b>FY 2024 Cost per Hearing</b>	<b>\$ 32.30</b>
<b>Current Cost per Hearing</b>	<b>\$ 31.67</b>
<b>\$ Increase (Reduction) in Cost per Hearing</b>	<b>\$ (0.63)</b>
<b>% Increase (Reduction) in Cost per Hearing</b>	<b>-2.0%</b>

# TRAVIS CENTRAL APPRAISAL DISTRICT

**BOARD OFFICERS**  
 JAMES VALADEZ  
 CHAIRPERSON  
 DEBORAH CARTWRIGHT  
 VICE CHAIRPERSON  
 NICOLE CONLEY  
 SECRETARY/TREASURER



LEANA MANN  
 CHIEF APPRAISER

**BOARD MEMBERS**  
 JETT HANNA  
 JOHN HAVENSTRITE  
 CELIA ISRAEL  
 DICK LAVINE  
 SHENGHAO "DANIEL" WANG  
 BLANCA ZAMORA-GARCIA

TO: Travis Central Appraisal District  
 Board of Directors

FROM: Leana Mann  
 Chief Appraiser

DATE: September 5, 2025

RE: Item No. 4D- Budget Line-Item Transfers

I request that the Board of Directors make the following line-item transfers to the 2025 budget as presented below. The line-item transfers do not require any additional funds from the taxing jurisdictions, as the transfers do not affect the overall dollar amount of the budget.

**Transfers From**

GL Code	GL Description	Decreases
40540	Professional Services	(79,500)
40910	Capital Equipment	(6,965)
<b>Total</b>		<b>\$ (86,465)</b>

**Transfers To**

GL Code	GL Description	Increases
40231	Books, Publications, Subscriptions & Databases	79,500
40910	Capital Equipment	6,965
<b>Total</b>		<b>\$ 86,465</b>

**Personnel Status Report**  
**9/4/2025**

<b>Personnel Changes:</b>				
<b>Name</b>	<b>Action</b>	<b>Date</b>	<b>Job Title</b>	<b>Division</b>
Kiara Walker	Separation	07/31/2025	Exemptions Clerk	Customer Service
Jazmin Gonzalez	Promotion	08/08/2025	Asst. Dir. of Residential Appr.	Residential
Savannah Gower	Promotion	08/26/2025	Residential Manager	Residential

**Current Openings:**

<b>Job Posting#</b>	<b>Posting Date</b>	<b>Position</b>	<b>Division</b>	<b># of Positions</b>
2025132205	Aug-2025	Exemptions Clerk	Customer Service	1
2025142305	Aug-2025	Commercial Team Lead	Commercial Appraisal	2
2025145306	Aug-2025	Residential Team Lead	Residential Appraisal	1
Temp Service		Customer Service Rep	Customer Service	3
Temp Service		Appraisal Support Clerk	Appraisal Support	1



## **TRAVIS CENTRAL APPRAISAL DISTRICT BOARD OF DIRECTORS AGENDA ITEM DETAILS**

**Item** 5A: Discussion and Possible Action on Taxpayer Liaison Report

**Presenter** Betty Thompson, Taxpayer Liaison Officer

### **Background Information**

The TLO has provided the following reports:

- TLO Monthly Report
- TLO Complaint Log
- Deputy TLO Activity Log
- TLO Activity by Zip Code

### **Staff Recommendation & Motion Language**

There are no staff recommendations for this item.

No board actions needed for this item.

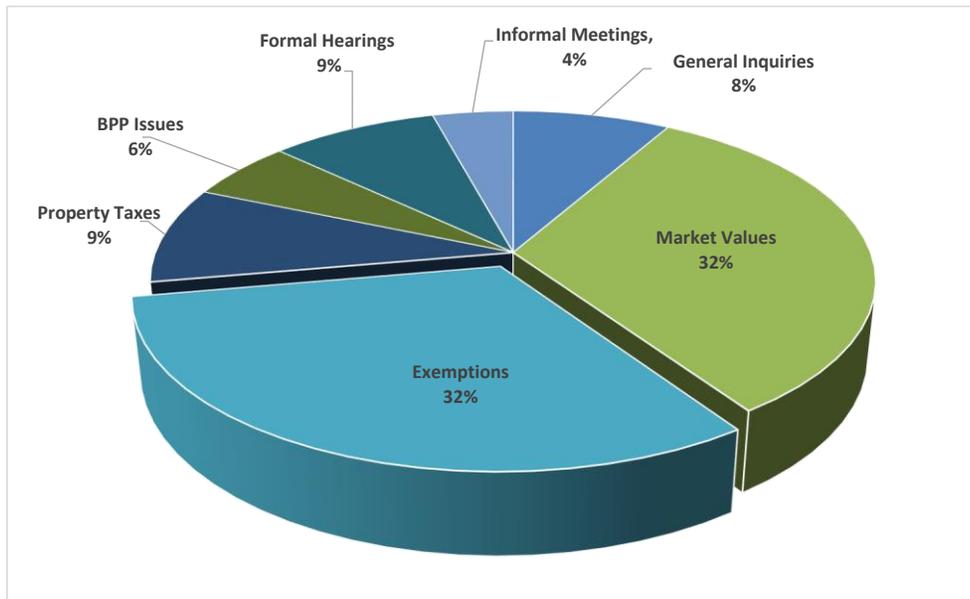
## 2025 Office of Taxpayer Liaison Monthly Report

Month	General Inquiries	Narratives	Formal Hearings	Informal Meetings	Exemptions	BPP Issues	Open Records	Property Taxes	Market Values	TOTALS
January	6	0	0	0	37	1	0	8	12	64
February	3	1	2	0	10	2	0	6	11	35
March	10	0	0	0	21	3	0	8	11	53
April	7	0	2	2	38	9	0	8	32	98
May	7	0	6	13	18	3	0	10	45	102
June	7	0	20	7	24	3	0	5	37	103
July	3	0	15	2	15	6	1	4	22	68
August	4	1	5	0	18	5	0	3	13	49
September	0	0	0	0	0	0	0	0	0	0
October	0	0	0	0	0	0	0	0	0	0
November	0	0	0	0	0	0	0	0	0	0
December	0	0	0	0	0	0	0	0	0	0
<b>TOTALS</b>	<b>47</b>	<b>2</b>	<b>50</b>	<b>24</b>	<b>181</b>	<b>32</b>	<b>1</b>	<b>52</b>	<b>183</b>	<b>572</b>

Deputy TLO Activity
0
0
0
0
0
0
28
43
32
0
0
0
0
103

2025 YTD	2024 by Month	Yr Over Yr Change
64	34	88%
35	45	-22%
53	25	112%
98	82	20%
102	100	2%
131	140	-6%
111	163	-32%
81	220	-63%
0	27	
0	45	
0	32	
0	43	
<b>675</b>	<b>956</b>	<b>136%</b>

### 2025 Complaints by Category



# Taxpayer Liaison Activity Report

#	Date	Individual Type	Type of Contact	PID	Entity Involved	Complaint Type	Description	TLO Investigation & Response	Response Date	Complaint Level
1	8/21/2025	Property Owner	Email	176882	TCAD	Market Values	PO specifically requests the email sent be shared with the BOD. PO feels lake view adjustments are subjective and not applied equitably even on neighboring properties.	Base lot values are adjusted based on location/view.	8/29/2025	Step 5/Tier 4
2	8/15/2025	Property Owner	Email		TCAD	Exemptions	PO writes follow up after BOD Meeting. Recalculation of 2023 Tax Ceiling explained.	Requesting follow-up meeting with CAD Attorney. Meeting date TBD based on PO's availability.	8/26/2025	Step 5/Tier 4
3	8/27/2025	Other	Email	475032	ARB	Formal Hearings	Attorney objected to the CAD's evidence in recent hearing was not posted to his Agent portal.	The PO did not submit an AOA, so the Attorney should not have expected the evidence be posted to the Agent portal. Referred to ARB Chair for review.	8/28/2025	Step 5/Tier 2
4	8/8/2025	Property Owner	Email		ARB	Formal Hearings	PO rec'd FTA and claims having visited CS to reschedule on the day prior to the hearing.	Could not verify PO had visited Cust Svc. ARB denied reopening the hearings.	8/15/2025	Step 5/Tier 2
5	8/6/2025	Property Owner	Email		TCAD	BPP Issues	Agent indicates filing of a protest under the 2024 PID was not connected to the currently assigned PID. Can the protest be filed?	Referred to the ARB for consideration.	8/7/2025	Step 5/Tier 2
6	8/28/2025	Property Owner	Email		TCAD	Market Values	PO has 2025 Noticed Value for BPP. Co is not in operation.	ARB responded with open Late Motion Protest options. Forwarded filing to ARB and advised counsel the acct has an assigned Agent who will receive the Notice of Hearing date/time.	8/28/2025	Step 5/Tier 1
7	8/28/2025	Other	Email	819759	TCAD	Market Values	Attorney submits 25.25 (c ) Late Motion for five prior yrs.		8/29/2025	Step 5/Tier 1
8	8/28/2025	Other	Email	217212	TCAD	Exemptions	PO parents, now deceased, did not apply for their HS due in 2023. How as Executor of the Estate can this be done?	Requested add'l info to refer to Exemption staff.	8/29/2025	Step 5/Tier 1
9	8/28/2025	Property Owner	Email	935671	TCAD	Property Taxes	PO requests time to pay delinquent taxes prior to appearing before the Judge. COA employee is unable to locate address under property search function and requests assistance.	Provided PO with most recent Tax Bill with instructions to pay. County Attorney granted time.	8/29/2025	Step 5/Tier 1
10	8/27/2025	Other	Email		TCAD	General Inquiries		Provided correct styling of address to find multiple business located at the address.	8/29/2025	Step 5/Tier 1

# Taxpayer Liaison Activity Report

#	Date	Individual Type	Type of Contact	PID	Entity Involved	Complaint Type	Description	TLO Investigation & Response	Response Date	Complaint Level
11	8/26/2025	Property Owner	Email	945824	TCAD	Market Values	PO requests a review of the 2024 Market Value as inequitable with others.	The PO had an assigned Agent in 2024 who filed and settled the value in July of 2024. Any appeal of that value under the TPTC has expired.	5/28/2025	Step 5/Tier 1
12	8/26/2025	Property Owner	Email		TCAD	BPP Issues	PO states a Rendition for multiple locations and PID was sent cert mail and noted as not rec'd. No protest was filed, so how will this be corrected.	On multiple accounts the NOV was mailed six to seven weeks later with no protest filed for differing opinion of value. Provide Late Motion options and forms to appeal the 2025 Market Value.	8/28/2025	Step 5/Tier 1
13	8/25/2025	Property Owner	Email	178413	TCAD	Market Values	PO submits evidence of condition of property.	The 2025 Market Value has been determined through a FH. PO has been denied prior year filings. Provided PO with Late Motion fining info and form should it be applicable.	8/28/2025	Step 5/Tier 1
14	8/22/2025	Property Owner	Email	218070	TCAD	Exemptions	<b>Referred by Chief Appraiser:</b> PO does not detail the assistance requested related to the property's exemption status.	Requested more detail from PO 8/29.		Step 5/Tier 1
15	8/21/2025	Property Owner	Email	199625	TCAD	General Inquiries	PO inquires is action is needed on their part when receiving updates from the Tax Transparency website.	These email notices are to advise owners when budget hearings are occurring or when a taxing entity has posted their approved 2025 rate.	8/21/2025	Step 5/Tier 1
16	8/21/2025	Property Owner	Email		TCAD	Market Values	PO inquires why model match next door is not equally valued.	Next door is not a model match with a lower valued class of a build. Suggested PO request a Field Check to review the class of his property. PO has no Exemptions on property. Inquired if PO might be eligible.	8/29/2025	Step 5/Tier 1
17	8/20/2025	Other	Phone		TCAD	Market Values	Mueller Foundation requests appraisal information related to change in use of garage space.	Awaiting phone conference.		Step 5/Tier 1
18	8/20/2025	Property Owner	Email	194276	TCAD	Exemptions	PO missed Historic Exemption deadline. Would like to file the form now.	Suggested PO file now for review by the Exemptions Section.	8/20/2025	Step 5/Tier 1
19	8/20/2025	Property Owner	Email		TCAD	Exemptions	PO recently purchased a new home and the deed has not been updated. Seeks info as to when this will occur and when to apply for a HS Exemption.	The updated deed info has not been sent by the County Clerk's Office. The new owner may apply at any time for the 2026 HS Exemption. Preferably when the TDL or ID Card has been updated and before the April 30th deadline. Suggested there may be applicable webinars of interest to PO.	8/21/2025	Step 5/Tier 1

# Taxpayer Liaison Activity Report

#	Date	Individual Type	Type of Contact	PID	Entity Involved	Complaint Type	Description	TLO Investigation & Response	Response Date	Complaint Level
20	8/19/2025	Property Owner	Email		TCAD	General Inquiries	PO inquires the purpose of an email rec'd regarding a budget workshop/meeting for one of the taxing entities.	This is the forum property owners should attend if they disagree with proposed increases. Once a taxing entity's budget is adopted with an approved rate increase, it is too late to object.	8/19/2025	Step 5/Tier 1
21	8/19/2025	Property Owner	Email	473961	TCAD	Exemptions	PO request to have NOV re-issued with corrected Net Appraised Value.	The PO's HS Exemption was temporarily removed due to a deed change from individual ownership to a Trust. The Appraisal District cannot under TPTC reissue a NOV to assist the PO in correcting an Agent's billing of the fee due for representation.	8/28/2025	Step 5/Tier 1
22	8/19/2025	Property Owner	Email	474210	TCAD	Formal Hearings	PO complains the treatment during the Formal Hearing was unsettling and would like further consideration of appealing the value.	PO's imp is valued as a homesteaded salvage property. The PO requests \$1 value plus an added reduction for the demolition costs. The land value is acceptable. Provided PO with info related to the next appeal option of Binding Arbitration.	8/20/2025	Step 5/Tier 1
23	8/19/2025	Property Owner	Email	439656	TCAD	Market Values	PO in IH rec'd adjustment to sq ft appraised. Wonders how to change previous yrs.	Provided PO with Late Motion Protest Form, filing instructions and explanation of the process.	8/21/2025	Step 5/Tier 1
24	8/18/2025	Agent	Email	562649	TCAD	Exemptions	Agent inquires if an IH will be held on the denial of the Exemption and value protest.	Protest of value is timely. Copied BPP to schedule IH with Agent. Review of the Exemption denial will be done in a FH before an ARB Panel.	8/19/2025	Step 5/Tier 1
25	8/18/2025	Property Owner	Email	709781	TCAD	Market Values	PO indicates he has just completed his Arbitration Hearing and would like to meet to discuss the next steps.	Provided PO with Binding Arbitration form, fee schedule and deadline. PO's FH was 8/5, so this is the next step in the protest process.	8/18/2025	Step 5/Tier 1
26	8/18/2025	Property Owner	Email	934418	TCAD	Exemptions	PO has been unable to file for HS and Disability Exemption.	Provided PO form and requested that the PO return the info via USPS if unable to submit the required info via the website.	8/18/2025	Step 5/Tier 1
27	8/18/2025	Property Owner	Email		TCAD	Exemptions	Reported fraudulent HS Exemption.	Thanked PO for the report and supporting evidence. Forwarded to Exemptions.	8/19/2025	Step 5/Tier 1
28	8/18/2025	Property Owner	Email	322707	TCAD	Market Values	PO seeks review and advice after requesting the ARB reopen the FH held.	ARB Chair has indicated the FH will not be reopened for cause. Provided PO with Binding Arbitration information and filing form.	5/19/2025	Step 5/Tier 1

# Taxpayer Liaison Activity Report

#	Date	Individual Type	Type of Contact	PID	Entity Involved	Complaint Type	Description	TLO Investigation & Response	Response Date	Complaint Level
29	8/15/2025	Other	Email		TCAD	Exemptions	PO submits a sample list of exemptions that have not been reinstated expressing concern that exemptions might be due to the owner.	As part of the Exemption Verification Program multiple letters are sent to a PO initially calling for an application plus reminder notices before a cancellation letter might be sent. The PO has had multiple opportunities to submit the requested information before the Exemption is actually removed. In addition, the law provides a late application window for a PO to apply for the two preceding years.	8/29/2025	Step 5/Tier 1
30	8/14/2025	Property Owner	Email	322722	TCAD	Exemptions	PO purchased in Feb 2025 and has been denied 2025 Exemption due to an applied Seller's HS Exemption. Would like to protest, but unable to find Portal PIN.	Provided PO with Protest Form. Only timely protests may be filed via the portal. Offered education of the lawful reason the seller's exemption will not be removed plus the tax liability increase that would occur should their partial year exemption be approved.	8/15/2025	Step 5/Tier 1
31	8/13/2025	Property Owner	Phone	475354	TCAD	Property Taxes	PO is billed for two ESD taxing units.	GIS verified accuracy of taxing entities billing with overlapping jurisdiction.	8/14/2025	Step 5/Tier 1
32	8/13/2025	Property Owner	Email	783841	TCAD	BPP Issues	PO has been in communication with BPP regarding a 10% late reporting penalty. Initially told it would be removed as an error, now advised it is a value assessment. Clearly marked as a penalty on Travis Taxes.	Referred to Manager of BPP for review and response 8/15. The 10% penalty was removed and PO withdrew the protest. Requested clarification if that was the intent.	8/29/2025	Step 5/Tier 1
33	8/13/2025	Property Owner	Email	104742	TCAD	Exemptions	PO seeks correction of value limitation amount.	Provided explanation of the Value Limitation amount, a value correctly calculated.	8/15/2025	Step 5/Tier 1
34	8/12/2025	Property Owner	Email	208606	ARB	Formal Hearings	PO cannot connect to attend hearing.	Found an ARB decision had been made, so connection occurred. Confirmed to PO the FH determination.	8/15/2025	Step 5/Tier 1
35	8/11/2025	Property Owner	Email		TCAD	BPP Issues	PO through workpapers believed the value for two accounts was different than noticed. Asks for assistance.	ARB reviewed and opened 41.411 Late Motion Protests. The CAD has appraised the property and selling is an owner decision. Provided PO with info related to correcting the characteristics of the home. Requested RES review report.	8/13/2025	Step 5/Tier 1
36	8/11/2025	Property Owner	Email	841615	TCAD	Market Values	PO cites sq ft of home is overstated and inquires whether he can sell.		8/12/2025	Step 5/Tier 1

# Taxpayer Liaison Activity Report

#	Date	Individual Type	Type of Contact	PID	Entity Involved	Complaint Type	Description	TLO Investigation & Response	Response Date	Complaint Level
37	8/8/2025	Property Owner	Email	174915	TCAD	Market Values	ARB referred: PO questions uniform lot values, no consideration of Fee Appraisal as evidence of value and deferred maintenance issues. States the Appraiser did not pay attention, just worked on his computer.	2023 values for lot were set at a standard with a disc for smaller lots: equal and uniform. The Fee Appraisal contained comps from outside the Market Segment and sales older than 12 mos. No cost to cure on-going deferred maintenance issues was provided. The Appraiser, while listening to the PO's testimony, was reviewing the PO's comps and creating a new grid to include those comps. A new value was recommended and consideration given for the dated improvement. Value Limitation is a simple mathematical presentation of the difference in a property's Net Appraised/Taxable Value from the Market Value.	8/11/2025	Step 5/Tier 1
38	8/6/2025	Property Owner	Email	181155	TCAD	General Inquiries	PO asks for explanation of Value Limitation.		8/7/2025	Step 5/Tier 1
39	8/5/2025	Property Owner	Email	441258	TCAD	Property Taxes	PO inquires if exemptions are removed is there a way to estimate the taxes.	Provided newly created TCAD website feature providing this information.	8/6/2025	Step 5/Tier 1
40	8/1/2025	Property Owner	Phone	237320	TCAD	Market Values	PO would like to review why property has gone up not down.	CAD's evidence captures sales to justify the increase. PO has a Settlement Offer pending which will reduce the 2025 Market Value to the Net Appraised Value. PO will consider the offer or prepare for the upcoming FH.	8/1/2025	Step 5/Tier 1
41	7/31/2025	Property Owner	Email	914602	TCAD	BPP Issues	Business closed in 2023. Owner requests removal of the value for 2025.	Provided PO with Late Motion 25.25 (c ) Protest Form and instructions on ow to file.	8/4/2025	Step 5/Tier 1
42	7/31/2025	Other	Email	530958	TCAD	Exemptions	Citizen reports potential false claim of HS Exemption for a property being used for rental income.	Thanked citizen for report and forwarded to the Exemption Section.	8/4/2025	Step 5/Tier 1
43	7/31/2025	Property Owner	Email		TCAD	Property Taxes	PO indicates the 2025 NOV does not have current taxes. Would like to know tax liability, so the lender could reduce the monthly amt billed for escrow.	The 2025 tax rates for budgets are currently being reviewed by taxing entities with some requiring voter approval in November. Taxes for 2025 may be calculated using the Tax Office Estimator with the 2024 rates applied.	8/4/2025	Step 5/Tier 1
44	7/31/2025	Property Owner	Email		TCAD	Market Values	PO requests help in understanding how the properties listed in email have been lowered. No info was available through an PIR.	The TLO is not an Appraiser. These values have been lowered through the protest process. You may request, as an Open Records Request, the Market Grids for each PID as a starting point for analysis. This type of reduction would have no physical evidence such as in a Grid.	8/4/2025	Step 5/Tier 1

# Taxpayer Liaison Activity Report

#	Date	Individual Type	Type of Contact	PID	Entity Involved	Complaint Type	Description	TLO Investigation & Response	Response Date	Complaint Level
45	7/31/2025	Property Owner	Email	997773	TCAD	Market Values	PO inquires if more evidence can be presented to review after the ARB FH.	An ARB determination is an appealable order through Binding Arbitration. Provided PO with form and fees.	8/6/2025	Step 5/Tier 1
46	7/31/2025	Property Owner	Email		TCAD	Exemptions	Teacher without SSD benefits to receive an Award Letter has been denied benefits.	The CAD has acknowledged that an SSD Award Letter is the only acceptable proof of disability to grant the exemption.	8/6/2025	Step 5/Tier 1
47	7/30/2025	Property Owner	Email		TCAD	General Inquiries	PO/ARB Member requests an appointment.	Requested info related to concerns.	7/30/2025	Step 5/Tier 1
48	7/29/2025	Property Owner	Email	118666	TCAD	Property Taxes	PO inquires if there are options to reduce her taxes which have risen to a level of unaffordability.	PO has lowered the 2025 Noticed Market Value through the IH process. PO has an approved >65 Exemption capping the ISD taxes paid annually. Informed PO the Tax Office offers options for seniors to either enter into a quarterly payment plan without penalty and interest or to defer taxes for remainder of ownership.	8/4/2025	Step 5/Tier 1
49	7/29/2025	Property Owner	Email	310892	ARB	Formal Hearings	PO submitted "Good Cause" Reason to have missed FH. ARB denied reopening the hearing.	ARB certified on 7/18 which expires the ARB Chair's ability to accept "Good Cause" as justification to reopen a hearing. The PO's hearing was scheduled for 7/28 after certification.	8/4/2025	Step 5/Tier 1
50	7/29/2025	Property Owner	Email	118666	TCAD	Exemptions	PO inquires if all possible eligible exemptions have been applied.	PO has an approved HS and >65 Exemption. No other exemptions are known. The Legislative proposed increase in the HS and >65 exemption amounts pending voter approval may provide some reduction in 2025.	9/1/2025	Step 5/Tier 1
51	7/23/2025	Other	Email		TCAD	Exemptions	Agent inquires status of multiple protests.	All properties listed have open AG Exemption protests.	9/2/2025	Step 5/Tier 1
52	8/5/2025	Property Owner	Email		TCAD	Narratives	PO gives opinion regarding a possible county tax increase to pay for flood damage.	Directed PO to Travis County Commissioners' website.	8/6/2025	Step 5/Tier 1
53	8/19/2025	Agent	Email		TCAD	BPP Issues	Agent inquires if no notice was rec'd, is there an option to resolve without filing a 41.411 protest?	After certification the only opportunity to review value is through an open protest. The 41.411 Late Motion is the correct filing option.	8/19/2025	Step 1
54	8/18/2025	Property Owner	Email	889729	TCAD	Exemptions	PO inquires if exemption has been approved.	PO's exemption has been approved and is in place for 2025.	8/18/2025	Step 1
55	8/18/2025	Property Owner	Email	174601	TCAD	Exemptions	PO states HS Exemption has been approved. Market and Appraised Value remain equal.	GIS verified a HS Exemption has been approved. The Net Appraised/Taxable Value in the first full year of a HS Exemption are set to the same value.	8/19/2025	Step 1

# Taxpayer Liaison Activity Report

#	Date	Individual Type	Type of Contact	PID	Entity Involved	Complaint Type	Description	TLO Investigation & Response	Response Date	Complaint Level
56	8/18/2025	Property Owner	Email		TCAD	Exemptions	PO is estate planning and inquires if a Trust will eliminate the exemptions held.	The Trust must be a Qualifying Trust under the TPTC to retain the exemptions held.	8/19/2025	Step 1
57	8/11/2025	Property Owner	Email		TCAD	Exemptions	PO reports HS Application issue.	Application app tested and found without problems. PO reported second time. Sent paper application.	8/11/2025	Step 1
58	8/6/2025	Property Owner	Email	306524	TCAD	Exemptions	PO writes to apply for >65 Exemption. Cannot find application.	The >65 Exemption was applied beginning in 2023. There is no need at this time to submit an application to continue in 2025.	8/8/2025	Step 1
59	8/5/2025	Property Owner	Email	502728	ARB	Formal Hearings	PO requests reschedule of FH. PO inquires if HS Application is completed.	Hearing has been rescheduled to 8/13. Provided PO Affidavit should they be unable to attend in person.	8/5/2025	Step 1
60	8/4/2025	Property Owner	Email	484184	TCAD	Exemptions		PO's Exemptions have been reinstated.	8/5/2025	Step 1

# Deputy Taxpayer Liaison Activity Report

Date	Individual Name	Individual Type	Type of Contact	PID	Language	Entity Involved	Assistance Type	Description	Status
1	8/4/2025 Jacqueline Guice	Property Owner	In Person	720286	English	TCAD	General Inquiry	TP had a hearing , needed explanation about the process and was checking on her exemptions which were remove due to re-application process, because she applied late the exemptions were not showing on the notice. The exemptions were now on the acct. at hearing time.	Complete
2	8/4/2025 John Duda	Property Owner	In Person	563724	English	TCAD	Formal Hearings		Complete
3	8/5/2025 Amalia Thomas	Property Owner	In Person	888522	Spanish	ARB	Formal Hearing Language Assistance	TP had a formal hearing , I helped review her evidence and explained that there was an offer for a lower value, she accepted that new value and did not have to go to formal	Complete
4	8/5/2025 Luisa Jimenez Rebollar	Property Owner	In Person	219731	Spanish	ARB	Formal Hearing Language Assistance	TP had a protest for M/H value and was going to formal hearing with her info about M/H. I helped explaine her info to appraiser and gave the appraiser the correct make, year, and model name of M/H appraiser used the NADA book value for correct value and owner accepted new value.	Complete
5	8/5/2025 Andres Benitez Trjada	Property Owner	In Person	219697	Spanish	ARB	Formal Hearing Language Assistance	TP had a protest for M/H value and was going to formal hearing with her info about M/H. I helped explaine her info to appraiser and gave the appraiser the correct make, year, and model name of M/H appraiser used the NADA book value for correct value and owner accepted new value.	Complete
6	8/5/2025 Andres Benitez Trjada	Property Owner	In Person	219751	Spanish	ARB	Formal Hearing Language Assistance	TP had a protest for M/H value and was going to formal hearing with her info about M/H. I helped explaine her info to appraiser and gave the appraiser the correct make, year, and model name of M/H appraiser used the NADA book value for correct value and owner accepted new value.	Complete
7	8/5/2025 Luisa Jimenez Rebollar	Property Owner	In Person	223032	Spanish	ARB	Formal Hearing Language Assistance	TP had a protest for M/H value and was going to formal hearing with her info about M/H. I helped explaine her info to appraiser and gave the appraiser the correct make, year, and model name of M/H appraiser used the NADA book value for correct value and owner accepted new value.	Complete
8	8/5/2025 Maneesh Amancharla	Property Owner	In Person	107334	English	ARB	Formal Hearings	TP accepted informal offer to a lower value . They had many qusetions about the process. They wanted to be better informed and prepared for future hearing.	Complete
9	8/6/2025 Sergio Quintanilla	Property Owner	Phone	162587	Spanish	ARB	Formal Hearing Language Assistance	TP protested land value, he did not have any evidence mostly I had to explaine how we value based on sales and there were 33 vacant land sales.	Complete
10	8/6/2025 Abel Medina Saavedra	Property Owner	In Person	835985	Spanish	ARB	Formal Hearing Language Assistance	TP needed help with the info and pictures for evidence he had. We got all his pics.scanned in for hearing .	Complete
11	8/7/2025 Abrham Matiyos	Property Owner	In Person	868089	English	TCAD	General Inquiry	TP did not appear for his formal hearing, he was hoping I could reset the hearing which was in June. I gave him the email to ARB chair for a late hearing request.	Complete
12	8/7/2025 Kathryn Smith	Property Owner	In Person	319411	English	TCAD	General Inquiry	TP had a Mkt. value hearing and needed to understand how her taxes would be affected. I explained the net appraised value and taxable value after exemptions and she was pleased to know her taxable value was much lower and school freeze was even lower.	Complete
13	8/7/2025 Bari Lynn Scherrer	Property Owner	In Person	155241	English	TCAD	General Inquiry	TP's were very upset after ARB hearing, after hearing the information they had and talking to appraiser in the hearing. I explained in detail that the sales in their mkt. area supported the notice value and that it was very fair that the ARB actually lowered the value to their Listing price. They wanted a lower price then listing price because it had not sold. The ARB lowered value from 678,622 to 595,000. I informed them of their next option for arbitration.	Complete

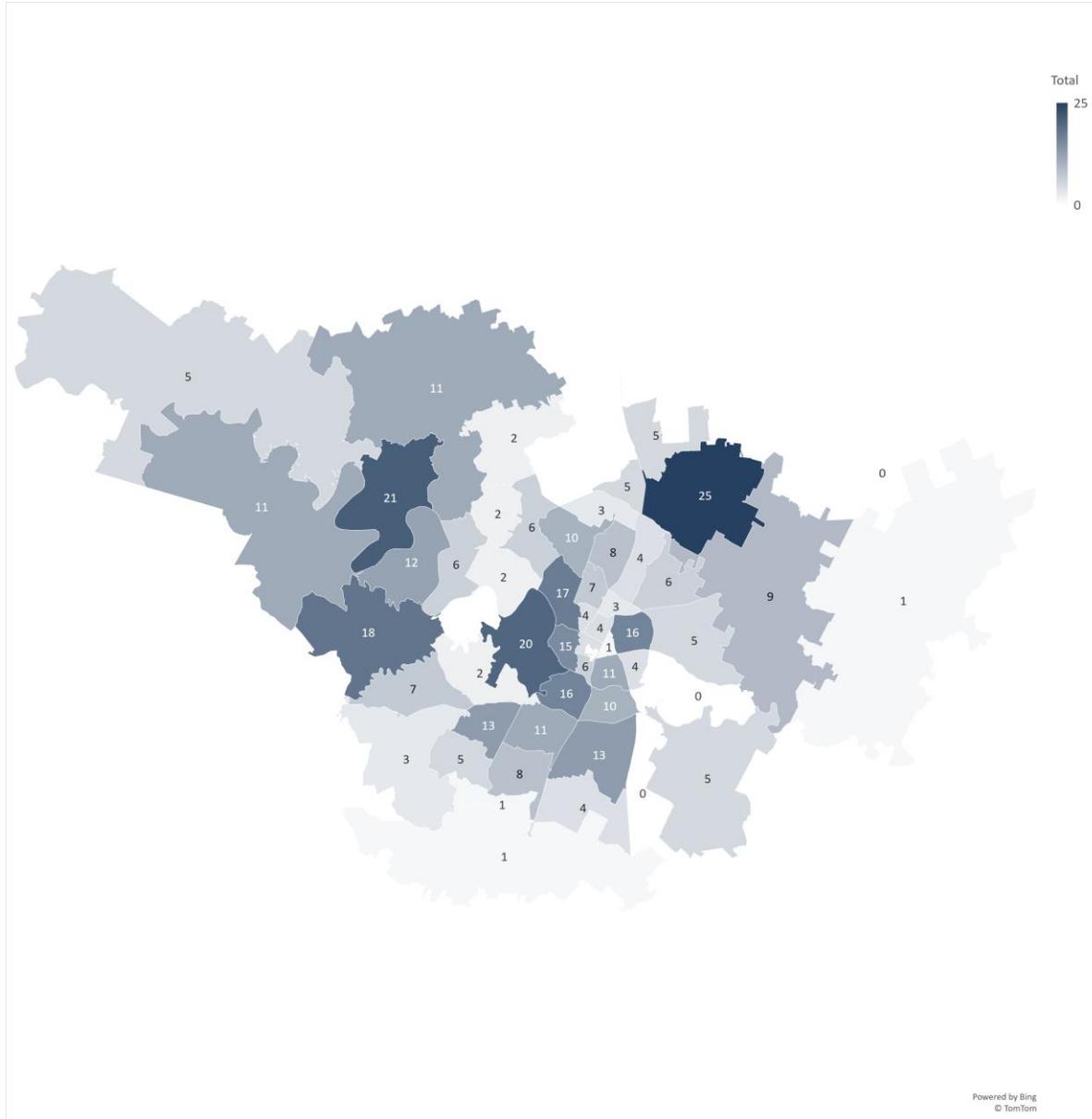
# Deputy Taxpayer Liaison Activity Report

Date	Individual Name	Individual Type	Type of Contact	PID	Language	Entity Involved	Assistance Type	Description	Status	
14	8/11/2025	Mary Fero	Property Owner	In Person	237320	English	ARB	Formal Hearings	TP sat in on a Formal hearing and wanted more info about the process she was getting ready for her formal hearing the following day.	Complete
15	8/11/2025	Cuevas Marsh Trust	Property Owner	In Person	438033	English	ARB	Exemptions	TP had lost exemptions because a change from the ownership to a trust. At hearing time the exemptions were back on because he had submitted the forms needed. He came to me after his hearing because he did not understand the process of the sales in the grids and the adjustments. I showed him the 2025 taxable value after exemptions and he was satisfied.	Complete
16	8/11/2025	Connor Matthews	Property Owner	In Person	972504	English	ARB	General Inquiry	TP had a value hearing but wanted more info about how his property would be affected for 2026 because the value for 2025 was with home only at 75% comp. Also gave him info about H/S exemption.	Complete
17	8/11/2025	Tinoco Gutierrez	Property Owner	In Person	984667	Spanish	ARB	Formal Hearing Language Assistance	TP came in for a formal hearing, after I reviewed his evidence he was informed that he had an offer to lower value. TP accepted value and did not have go to formal hearing.	Complete
18	8/11/2025	Rachel Hamessley	Property Owner	In Person	509078	English	ARB	Formal Hearings		Complete
19	8/11/2025	Jose H Machuca	Property Owner	In Person	297632	Spanish	ARB	Formal Hearing Language Assistance	TP came in for his formal hearing the issue that he was protesting was that TCAD had a second improvement on the roll labled as a home with a very high value. The evidence he had was reviewed and changed to det. Storage. The value change was good for owner and it was settled informal.	Complete
20	8/11/2025	Donald Morrison	Property Owner	In Person	141009	English	ARB	Formal Hearings	TP came to talk to me after his formal hearing, he strongly disagreed with the method that TCAD distributes value when a mkt. value is changed. The ARB changed value over all to 1,900.000 which was lower then land value and it made his home value 0 He wanted his land value to change because he didnt agree with land value . The ARB did not agree with him that the land value was wrong. I gave him info on what is the next step and informed him that I could not change an ARB decision.	Complete
21	8/12/2025	Ana Silvia Midence	Property Owner	In Person	976853	Spanish	ARB	Formal Hearing Language Assistance	TP protested M/H value . I had appraiser review value based on correct M/H info and book value. The value went from 76,792 to 21,332	Complete
22	8/12/2025	Francisco Rodriguez	Property Owner	In Person	318984	Spanish	ARB	Formal Hearing Language Assistance	TP protested value for 2025 came in for a hearing with evidence of purchase price. Appraiser reviewed info and lowered value with no need for a formal hearing.	Complete
23	8/12/2025	Vicky Puckett	Property Owner	In Person	111278	English	ARB	General Inquiry	TP did not get the requested value at hearing and wanted to understand how it would affect the amount of taxes or the taxable value minus exemptions. I was able to show her that the net value was much lower then mkt. value. Once she understood the process she was satisfied.	Complete
24	8/12/2025	Shojaee Parvin Trust	Property Owner	In Person	134074	English	TCAD	Exemptions	TP wanted an explanation about the removal of the exemptions. They came off due to the change from owner to a Trust. Owner did not want to show copies of Trust for verification. Trust issues, I was able to convince them to look through the docs. And only pick out the pages we needed for the exemptios.	Complete
25	8/13/2025	David Reyes	Property Owner	In Person	198560	Spanish	TCAD	Exemptions	TP wanted more info about the net taxable value minus exemptios value and an estimate of taxes for 2025.	Complete

# Deputy Taxpayer Liaison Activity Report

Date	Individual Name	Individual Type	Type of Contact	PID	Language	Entity Involved	Assistance Type	Description	Status	
26	8/13/2025	Kawoos Zafar	Property Owner	In Person	984699	English	ARB	Formal Hearings	TP asked to talk to TLO because he felt that he had not been treated fairly during the informal and formal hearing. He purchased home in 2024 and paid less the notice value. The problem was that he did not have his closing docs. with him and was not told to bring them or didn't know he needed them. In the hearing he told them he paid less, the ARB formal was held and value was set but not to purchase price. TP wanted me to ask ARB chair to please reopen hearing because he now had closing docs. for sale. I tried but was denied.	Complete
27	8/14/2025	Victor Segovia	Property Owner	In Person	334349	Spanish	ARB	Formal Hearing Language Assistance	TP had his formal hearing needed assistance with evidence. He had an offer at CS window with appraiser and accepted the informal offer .	Complete
28	8/14/2025	Reyna Zepeda	Property Owner	In Person	245275	Spanish	ARB	Formal Hearing Language Assistance	TP came in for formal hearing needed help with info and evidence at CS window. Appraiser offered to lower value and She accepted new value and did not have to go to formal.	Complete
29	8/14/2025	Donald Burklund	Property Owner	Phone	995971	English	TCAD	Formal Hearings	TP had several questions about ag. valuation and why his acg. was valued for more per ac. Then a neighbors acg. He had a formal hearing but was not clear on the methods of valuation for acreage. He was comparing an acreage that was much bigger then his .	Complete
30	8/14/2025	Maria Catalan	Property Owner	In Person	982453	Spanish	ARB	Formal Hearing Language Assistance	TP had a formal hearing for M/H value. Per review with appraiser and the NADA book value, the ARB lowered the value. After the hearing she realized that she only had hearing for PP M/H value . She needed help with the land account which has 2 other M/H's that are not hers. I helped her file a late protest 25.25 C to correct value.	Complete
31	8/27/2025	Matthew Jarosz	Property Owner	Phone	902454	English	ARB	Formal Hearings	TP failed to appear to formal hearing. He filed to ARB to get a late hearing but was denied. He called me because he says never got the letter for date and time. We were able to find the email for his date and time. I told him there was nothing else I could do. He did not qualify for anyother type of hearing.	Complete
32	8/28/2025	William Valdes	Property Owner	Phone	278958	Spanish	ARB	Formal Hearing Language Assistance	TP needed help explaining the different things that TCAD had wrong on her account. The class of the tiny house was wrong, sq, ft. were off. The appraiser made chgs. And TP was in agreement with new value.	Complete

### 2025 Taxpayer Liaison Activity by Zip Code



Activity by Area ISD	
Austin ISD: 78652, 78701, 78702, 78703, 78704, 78705, 78722, 78723, 78731, 78735, 78736, 78737, 78739, 78741, 78745, 78748, 78749, 78751, 78753, 78756, 78757, 78758, 78759	221
Del Valle ISD: 78610, 78617, 78725, 78742	6
Eanes: 78733, 78746	27
Elgin ISD: 78653	9
Lake Travis ISD: 78734, 78738, 78669	41
Leander/Lago Vista ISD: 78613, 78730, 78732, 78641, 78645	32
Manor ISD: 78621, 78744, 78754	23
Pflugerville ISD: 78660	25
Round Rock: 78727, 78728, 78750	14



## **TRAVIS CENTRAL APPRAISAL DISTRICT BOARD OF DIRECTORS AGENDA ITEM DETAILS**

**Item** 5B: Discussion and Possible Action on Appraisal Review Board Chairman Report

**Presenter** Barry McBee, ARB Chairman

### **Background Information**

ARB Chairman Barry McBee will brief the Board of Directors on activities of the ARB.

### **Staff Recommendation & Motion Language**

There are no staff recommendations for this item.

No board action is needed for this item.



## **TRAVIS CENTRAL APPRAISAL DISTRICT BOARD OF DIRECTORS AGENDA ITEM DETAILS**

**Item** 5C: Discussion and possible action on removal of appraisal review board members that have resigned.

**Presenter** Betty Thompson, Taxpayer Liaison Officer

### **Background Information**

Tax Code Section 6.41(f) states that a member of the ARB may be removed by a majority vote of the Board. Grounds for removal are:

- A violation of Tax Codes Sections 6.412, 6.413, 41.66(f), or 41.69;
- Good cause relating to the attendance of members at called meetings of the ARB as established by written policy adopted by a majority of the Board; or
- Evidence of repeated bias or misconduct.

The following ARB members have submitted a resignation notice and need to be formally removed from the ARB:

- Steve Harr
- Punit Singh

### **Staff Recommendation & Motion Language**

Staff recommends that ARB members who have submitted a resignation notice be removed from the ARB.

*I move to remove Steve Harr and Punit Singh, who have formally resigned, from the Appraisal Review Board.*

----- Forwarded message -----

From: **TARB Members** <[tarbmembers@gmail.com](mailto:tarbmembers@gmail.com)>

Date: Thu, Jul 31, 2025 at 9:24 AM

Subject: Harr

To: TARB Members <[tarbmembers@gmail.com](mailto:tarbmembers@gmail.com)>

Good morning. This is Steve Harr. I'm going to need to remain unscheduled for the remainder of the protest season. I had anticipated being able to complete the current term. Personal situation has changed due to the recent sale of our home scheduled for late August. We're also scheduled to close on a new home in Tulsa late August. I'm currently out of State visiting family with limited access to email. I would like to schedule a time to connect with Mr. McBee by phone early next week when I'm back in Austin. Regards, Steve

---

From: **Punit Singh** <[REDACTED]>

Date: Thu, Jun 12, 2025 at 5:03 PM

Subject: RE: Friday June 13 Schedule

To: TARB Members <[tarbmembers@gmail.com](mailto:tarbmembers@gmail.com)>

Correct.

I wish to resign and I understand the below obligations for protest.

**Sincerely,**

**Punit Singh,**

Owner and President,

CMIT Solutions

---



## **TRAVIS CENTRAL APPRAISAL DISTRICT BOARD OF DIRECTORS AGENDA ITEM DETAILS**

**Item** 5D: Discussion on Report from Appraisal Review Board Committee

**Presenter** ARB Committee Members

### **Background Information**

The ARB Committee met on Monday, September 8, 2025 to discuss the ARB appointment process for 2026.

Members of the ARB Committee will provide an update on their work to the full Board of Directors.

### **Staff Recommendation & Motion Language**

No staff recommendations on this item.

No action is needed on this item.



## **TRAVIS CENTRAL APPRAISAL DISTRICT BOARD OF DIRECTORS AGENDA ITEM DETAILS**

**Item** 5D: Discussion and possible action of the number of appraisal review board members for 2026

**Presenter** Barry McBee, TARB Chairman

### **Background Information**

Tax Code Section 6.41(b-2) states, "An appraisal district board of directors for a district established in a county with a population of 1.2 million or more by resolution of a majority of the board's members shall increase the size of the district's appraisal review board to the number of members the board of directors considers appropriate to manage the duties of the appraisal review board, including the duties of each special panel established under Section 6.425."

The Board of Directors passed resolution 20250612-5D in June 2025, modifying the appropriate size of the ARB to be a total of 100 budgeted members, with a total membership not to exceed 125 members.

### **Staff Recommendation & Motion Language**

Staff recommends maintaining the level of ARB membership at 100 budgeted members, with total membership not exceeding 125 members.

*I move to pass Resolution 20250911-5E, Resolution of the Board of Directors of the Travis Central Appraisal District, determining the appropriate number of Appraisal Review Board members for 2026, with an ARB membership of 100 budgeted members, with a total membership not to exceed 125 members.*



## **TRAVIS CENTRAL APPRAISAL DISTRICT BOARD OF DIRECTORS AGENDA ITEM DETAILS**

**Item** 5F: Discussion and possible action on modification of ARB Per Diem rates

**Presenter** Leana Mann, Chief Appraiser and Barry McBee, TARB Chairman

### **Background Information**

The Board of Directors recently approved a per diem rate change for the 2026 adopted budget. The ARB Chairman is requesting that these changes be made for the remainder of the 2025 budget year.

**The estimated additional cost for 2025 is approximately \$15,350.**

### **Staff Recommendation & Motion Language**

Staff and ARB Chairman recommend increasing the ARB per diem rates for the remainder of 2025 to match the per diem rates adopted in the 2026 budget.

*I move to adopt the ARB per diem rates as presented, effective for the period ending September 19, 2025.*

# TRAVIS CENTRAL APPRAISAL DISTRICT

**BOARD OFFICERS**  
 JAMES VALADEZ  
 CHAIRPERSON  
 DEBORAH CARTWRIGHT  
 VICE CHAIRPERSON  
 NICOLE CONLEY  
 SECRETARY/TREASURER



LEANA MANN  
 CHIEF APPRAISER

**BOARD MEMBERS**  
 JETT HANNA  
 JOHN HAVENSTRITE  
 CELIA ISRAEL  
 DICK LAVINE  
 SHENGHAO "DANIEL" WANG  
 BLANCA ZAMORA-GARCIA

**TO:** Board of Directors  
**FROM:** Leana Mann, Chief Appraiser  
**CC:** Barry McBee, ARB Chairman  
**DATE:** September 11, 2025  
**RE:** Appraisal Review Board Per Diem Rates

I would recommend that the Board of Directors adopt the following ARB Per Diem Rates, effective for the period ending September 19, 2025.

Members	1/2 Day (up to 4 hrs.)	Full Day	Quorum/Meeting <sup>(3)</sup>
Year 1 (Term 1) <sup>(4)</sup>	\$ 87.50	\$ 175.00	\$ 40.00
Year 2 (Term 1)	\$ 92.50	\$ 185.00	\$ 40.00
Year 3 (Term 2)	\$ 97.50	\$ 195.00	\$ 40.00
Year 4 (Term 2)	\$ 102.50	\$ 205.00	\$ 40.00
Year 5 (Term 3)	\$ 107.50	\$ 215.00	\$ 40.00
Year 6 (Term 3)	\$ 112.50	\$ 225.00	\$ 40.00
Team Leads <sup>(5)</sup>	\$ 112.50	\$ 225.00	\$ 40.00
Vice Chairperson/Secretary <sup>(1)</sup>	\$ 125.00	\$ 250.00	\$ 40.00
Chair-Elect <sup>(1)</sup>	\$ 125.00	\$ 250.00	\$ 40.00
Chairperson <sup>(1)</sup>	\$ 137.50	\$ 275.00	\$ 40.00

- Officer positions of Chair, Vice Chairperson, and Secretary are as appointed by the Board of Directors.
- The Appraisal Review Board Chairperson shall designate from the Appraisal Review Board membership Team Leads
- No change in rate of pay for a Quorum Meeting from the 2020 approved pay scale.
- No change from the previous policy of first-term members being designated as auxiliary ARB members, as originally adopted and approved in March 2018.
- No change to the number of Team Leads, as designated by the ARB Chair. The total number of Team Lead designations allowed is 4.

Sincerely,

Leana Mann, Chief Appraiser



## **TRAVIS CENTRAL APPRAISAL DISTRICT BOARD OF DIRECTORS AGENDA ITEM DETAILS**

**Item** 5G: Chief Appraiser's Report

**Presenter** Leana Mann, Chief Appraiser

### **Background Information**

The Chief Appraiser will provide an update on the current operations of the CAD, including:

- 2026 Field Work
- 2026 Homestead Verification Program
- Community Outreach
- Taxpayer Experience Snapshot
- Legislative Update

### **Staff Recommendation & Motion Language**

There are no staff recommendations for this item.

No board action is needed for this item.



# TRAVIS CENTRAL APPRAISAL DISTRICT

## COMMUNITY OUTREACH

### COMMUNITY OUTREACH CALENDAR

#### JANUARY 2025

- 7 Webinar: Your Property Tax Bill**  
Travis Central Appraisal District
- 8 Monthly Benefits Clinic**  
Austin VA/City of Austin

#### FEBRUARY 2025

- 1 Exemption Clinic**  
Del Valle Library
- 8 Homestead Exemptions**  
Del Valle Community Coalition
- 12 Monthly Benefits Clinic**  
Austin VA/City of Austin
- 27 Webinar: BPP Explained**  
Travis Central Appraisal District

#### MARCH 2025

- 1 Property Tax 101 Town Hall**  
Circle C HOA
- 4 TCAD 101 for Property Owners**  
Rotary Club of Austin
- 12 Monthly Benefits Clinic**  
Austin VA/City of Austin
- 19 Webinar: Homestead Exemptions**  
Travis Central Appraisal District
- 29 Exemption Clinic**  
Pflugerville Public Library

#### APRIL 2025

- 9 Monthly Benefits Clinic**  
Austin VA/City of Austin

#### APRIL 2025 (Continued)

- 12 Community Impact Day**  
Austin Black Real Estate Professionals
- 14 Community Resource Fair**  
Austin Police Department
- 16 How to Protest Your Appraisal**  
Austin Board of Realtors
- 19 Notices & The Protest Process**  
Anderson Community Development Corp.
- 22 Webinar: Notices & The Protest Process**  
Travis Central Appraisal District
- 23 How to Protest Your Appraisal**  
Austin Board of Realtors
- 23 Agriculture & Wildlife Valuations**  
Travis County
- 24 Notices & The Protest Process**  
Realty Austin/Mueller Residential
- 26 How to Protest Your Appraisal**  
Austin Board of Realtors
- 30 How to Protest Your Appraisal**  
Austin Board of Realtors

#### MAY 2025

- 12 Webinar: Notices & Protests**  
City of Jonestown
- 14 Monthly Benefits Clinic**  
Austin VA/City of Austin
- 21 Better Together Resource Fair**  
Department of Veterans Affairs



# TRAVIS CENTRAL APPRAISAL DISTRICT

## COMMUNITY OUTREACH

### COMMUNITY OUTREACH CALENDAR

#### JUNE 2025

- 6 TCAD 101 for Real Estate Professionals**  
Stanberry Realtors
- 18 Legislative Recap**  
Texas Women in Public Finance - Austin
- 21 Homeowner Resource Fair**  
Frost Bank

#### JULY 2025

- 9 Monthly Benefits Clinic**  
Austin VA/City of Austin

#### AUGUST 2025

- 1 Pflugerville Tax Office Reopening**  
Travis County Tax Office
- 2 Last Minute Exemption Clinic**  
Pflugerville Public Library
- 13 Webinar: Navigating TravisTaxes.com**  
Travis Central Appraisal District
- Monthly Benefits Clinic**  
Austin VA/City of Austin
- 20 TCAD 101 for Real Estate Professionals**  
Patten Title
- 21 TCAD 101 for Real Estate Professionals**  
Travis Central Appraisal District
- 23 Del Valle Day**  
Del Valle Community Coalition

#### SEPTEMBER 2025

- 13 Sandy Creek Fest**  
Rebuild Sandy Creek
- 20 Sandy Creek Exemption Clinic**  
Travis Central Appraisal District
- 24 TCAD 101 for Property Owners**  
Austin Neighborhoods Council

#### OCTOBER 2025

- 8 Monthly Benefits Clinic**  
Austin VA/City of Austin
- 15 TCAD 102 for Real Estate Professionals**  
Patten Title
- 18 Boo the Flu**  
Sendero Health
- 20 Community Resource Fair**  
Austin Police Department

#### NOVEMBER 2025

- 12 Monthly Benefits Clinic**  
Austin VA/City of Austin
- 15 Community Connections Resource Fair**  
Austin Energy

#### DECEMBER 2025

- 10 Monthly Benefits Clinic**  
Austin VA/City of Austin



# TRAVIS CENTRAL APPRAISAL DISTRICT

## TAXPAYER EXPERIENCE SNAPSHOT

### CUSTOMER SERVICE

Average In-Person Wait Time	5:02 minutes
Average Phone Wait Time	15:00 minutes
Average Exemption Processing Time	61 days

Yes, my inquiry was resolved.	94.8%
I am satisfied with the time it took to resolve my issue.	84.2%
My TCAD representative was knowledgeable about my issue.	88.2%
My TCAD representative was professional and courteous.	91.4%



### COMMUNITY OUTREACH

Today's event was excellent and informative.	88.3%
The content presented was helpful.	88%
I would recommend a TCAD event to a friend, family member, or neighbor.	88%



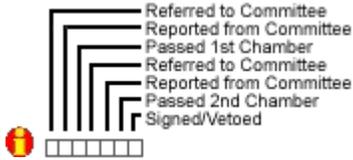
“ Leana was excellent! She truly cares for Austinites and wants to help as much as she can. I was especially impressed with her sincerity, knowledge, and kindness. I feel as though we are in great hands. ”

“ Thank you for your presentation. Leana and her team did an excellent job. ”

# 89<sup>th</sup> Legislative Session- 2<sup>nd</sup> Called Special Session

## Bill Research Report

09-04-2025 - 09:54:11



**T** [ ] HB 16

[Leach, Jeff\(R\)](#)

[Hughes, Bryan\(R\)](#)



Relating to the operation and administration of and practices and procedures related to proceedings in the judicial branch of state government, including court security, court documents and arrest warrants.

**General Remarks:**

FINAL VERSION: This bill states excess proceeds from a tax sale shall be sent by a delivery method described by Rule 21a , Texas Rules of Procedure to the former owner of the property. This bill adds a current or former county clerk, district clerk, or county and district clerk, or a current or former employee of the office of a county clerk, district clerk, or county and district clerk, a current or former employee whose duties relate to court administration, including a court clerk, court coordinator, court administrator, juvenile case manager, law clerk, or staff attorney, a current or former employee of the Office of Court Administration of the Texas Judicial System and entities administratively attached to the office, and a current or former employee or commissioner of the State Commission on Judicial Conduct to the list of individuals that can have their information redacted from the tax rolls. Effective on the 91st day after the last day of the legislative session.

**Track Name(s):**

Dual Track Appr/Coll

**Last Action:**

8-28-25 G Sent to the Governor

**T** [ ] HB 23

[Harless, Sam\(R\)](#)

[Bettencourt, Paul\(R\)](#)



Relating to the exemption from ad valorem taxation of property owned by certain nonprofit corporations, located in a populous county, and used to promote agriculture, support youth, and provide educational support in the community.

**General Remarks:**

FINAL VERSION: This bill states in a county with a population of 3.3 million or more, all real and personal property owned by a nonprofit corporation, organized exclusively for charitable, educational, and scientific purposes, and held for use in promoting agriculture, supporting youth, and providing educational support in the community is exempt from all ad valorem taxation. Effective 1/1/26

**Track Name(s):**

Exemptions

**Last Action:**

8-28-25 G Sent to the Governor



## TRAVIS CENTRAL APPRAISAL DISTRICT BOARD OF DIRECTORS AGENDA ITEM DETAILS

**Item** 5H: Discussion and possible action on authorization to purchase homestead verification project subscription through Omnia cooperative purchasing contract No. 2024056-02

**Presenter** Leana Mann, Chief Appraiser

### Background Information

Senate Bill 1801 from the 88<sup>th</sup> Legislative Session imposed the requirement for appraisal districts to audit homestead records at least once every five years. Travis CAD implemented a plan in 2024 to begin the homestead verification program, where homestead records are reviewed and verified to meet the audit requirements.

Travis CAD took an in-house approach for phase 1 of the homestead verification program, in which our internal staff reviewed 84,360 homestead exemptions. The leadership team also conducted a pilot program to review available subscription services to aid in the verification project. Through the pilot program and reviewing available subscriptions, Travis CAD identified True Roll as the vendor that provided the best solution and then conducted a pilot program of approximately 16,000 accounts where paper verification forms were submitted. The application was able to verify information submitted on the paper verification forms, and 14,900 (93%) were processed without further staff review.

In addition, the 89<sup>th</sup> legislative session created additional mandates that CADs cannot ask property owners to reapply for the homestead exemption to meet the audit requirements without providing specific reasons as to why the property owner is being asked to reapply. This further challenges the CAD in completing our statutorily mandated tasks of verifying homestead exemptions every five years.

The District recommends contracting with True Roll, using the Omnia cooperative purchasing contract number 2024056-02 for a term of October 1, 2025 through December 31, 2026. Travis CAD will audit 20% of the current homestead records for the 2026 Audit Year.

Term	Cost
October 1, 2025 through December 31, 2025	\$ 37,500
January 1, 2026 through December 31, 2026	\$ 150,000

## **Staff Recommendation & Motion Language**

The District recommends contracting with True Roll, using the Omnia cooperative purchasing contract number 2024056-02 for a term of October 1, 2025 through December 31, 2026 for a total cost of \$187,500.

*I move to authorize the purchase of homestead verification application services with True Roll, using the Omnia cooperative purchasing contract for a term of October 1, 2025 through December 31, 2026, for a total cost of \$187,500.*



Pricing Proposal  
Quotation #: 26589139  
Created On: 9/2/2025  
Valid Until: 9/30/2025

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## TX-County of Travis Central Appraisal District

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## Client Solutions Manager

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### Leana Mann

P.O.BOX 149012  
AUSTIN, TX 78714  
United States  
Phone: 512-834-9317 x405  
Fax: 512-835-5371  
Email: [lmann@tcadcentral.org](mailto:lmann@tcadcentral.org)

### Jonathan Gaudet

3828 Pecana Trail  
Austin, TX 78749  
Phone: (800) 870-6079 Option 2  
Fax: 512-732-0232  
Email: [Jonathan\\_Gaudet@shi.com](mailto:Jonathan_Gaudet@shi.com)

All Prices are in US Dollar (USD)

Product	Qty	Your Price	Total
1 TrueRoll - Initial MAPS Compliant Homestead Administration TrueRoll - Part#: NPN-TRUER-PROAC-B Contract Name: OMNIA Partners IT Solutions, Products & Services Contract #: 2024056-02 Coverage Term: 10/1/2025 – 12/31/2025 <b>Note:</b> TrueRoll Proactive Monitoring™ Phase One TrueRoll Application Vetter™ Paper	1	\$37,500.00	\$37,500.00
2 TrueRoll - Initial MAPS Compliant Homestead Administration TrueRoll - Part#: NPN-TRUER-PROAC-B Contract Name: OMNIA Partners IT Solutions, Products & Services Contract #: 2024056-02 Coverage Term: 1/1/2026 – 12/31/2026 <b>Note:</b> TrueRoll Proactive Monitoring™ Phase One TrueRoll Application Vetter™ Paper	1	\$150,000.00	\$150,000.00
		Total	\$187,500.00

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### Additional Comments

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Thank you for choosing SHI-GS! The pricing offered on this quote proposal is valid through the expiration date set above. To ensure the best level of service, please provide End User Name, Phone Number, Email Address and applicable Contract Number when submitting a Purchase Order. SHI Government Solutions, Inc. is 100% Minority Owned, Woman Owned Business. TAX ID# 22-3695478; DUNS# 14-724-3096

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*The products offered under this proposal are resold in accordance with the terms and conditions of the Contract referenced under that applicable line item.*



## End-To-End Homestead Administration™

An end-to-end solution for managing exemption roll accuracy and new application verification. TrueRoll will empower the Travis Central Appraisal District to **modernize its paper application processes & monitor its exemption roll in real-time.**

Prepared For:

Leana Mann  
Chief Appraiser  
Travis Central Appraisal District  
850 E Anderson Lane  
Austin, TX 78752

Prepared On: May 12th, 2025

Prepared By

Tyler Masterson, Jonathan Wiersma &  
Billy Kingston  
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# Cover Letter

Dear Chief Appraiser. Mann,

I hope this letter finds you well. I am writing to summarize the key value drivers that Travis County identified during our recently successful pilot project and demonstration of TrueRoll solutions. Our partnership together will focus specifically on SB1801 MAPS compliance via proactively monitoring homestead eligibility against TCAD eligibility rules, and automating the processing of new paper based homestead applications.

## TCAD Value Drivers Identified

**Continuation of the Successful Pilot with Efficient Application Vetting:** This approach minimizes the need for extensive post-application investigations and allows TCAD to automatically approve and deny applications based on office-specific business rules, ultimately saving time and resources. The automated risk scoring and eligibility checks have demonstrated during the pilot that they provide your office with actionable insights to make informed decisions quickly.

**Streamlined Compliance with SB 1801:** TrueRoll's MAPS compliance solution offers a robust framework for managing the complexities of SB 1801. By automating the eligibility checks for existing homesteads and monitoring them on a five-year cycle, and providing detailed annotation that the Travis team expressly emphasized would need to be uploaded to True Prodigy in defense of any exemption removals, we significantly reduce the workload on your team while ensuring compliance with state regulations.

**Scalability and Flexibility:** TrueRoll offers both self-service and full-service options for the MAPS compliance solution, allowing Travis CAD to choose the level of support that best fits your operational needs. This flexibility ensures that you can scale our services as needed without compromising on compliance or efficiency.

We are often asked to support our proposals with ROI cases in front of CAD Board of Directors. We're prepared to help TCAD present the case, and back up our ROI claims with a 100% ROI guarantee. Please let us know what support you need in presenting the partner that 8 out of the top 10 TX CADs by population have selected for homestead administration.

Thank you for considering TrueRoll as your compliance partner. We look forward to the possibility of working together.

Tyler Masterson,  
CoFounder & CEO, TrueRoll  
410-960-1153

# Solution Suite Description

The following marketing collateral pages describe the solutions described in this proposal that address the use cases described in conversations between Travis and TrueRoll:

## Products included in this proposal:

### **Application Vetter™ Paper Only**

*Continuation of the pilot solution for new homestead applications submitted by paper utilizing Application Vetter OCR capabilities and TCAD specific eligibility rules. that TCAD evaluated during the successful pilot.*

### **Proactive Monitoring™ Phase One**

*As part of SB1801 compliance, TrueRoll's Proactive Monitoring Phase One identifies and facilitates the removal of both historical and ongoing unqualified homestead exemptions, unlocking new taxable value for the district. In alignment with TCAD's change management strategy, this limited deployment will initially focus on a narrower eligibility criteria, ensuring a smooth organizational transition while still generating measurable ROI and audit-ready compliance.*

## MAPS Compliance

TrueRoll is the only vendor in Texas offering a full-service, MAPS-compliant homestead monitoring solution that evaluates the entire tax roll annually—far exceeding the traditional five-year audit cycle. This ensures appraisal districts meet the legislative requirements of SB1801 by continuously validating homestead eligibility with accuracy and consistency.

Our web-based platform uses Texas CAD-specific datasets, including direct integration with the TX DPS driver license database, to proactively flag likely ineligible exemptions. This automated approach minimizes citizen disruption and maximizes compliance while safeguarding tax revenue.

**Significant Staff Time Savings:** Manually reviewing even 20% of a roll with 261,165 exemptions would consume thousands of staff hours each year. TrueRoll dramatically reduces this burden through real-time eligibility checks and clear, actionable flags—allowing staff to focus on high-priority tasks rather than manual audits.

**You Maintain Full Control:** Your team retains decision-making authority over all exemption removals. TrueRoll’s platform provides detailed insights and eligibility indicators, fully aligned with your eligibility rules and documentation requirements.

**Seamless True Prodigy CAMA Integration:** TrueRoll’s software maintains a live connection with your CAMA system, ensuring your team always has access to the most current exemption data for compliance, audit readiness, and operational efficiency

# Pricing & Procurement

TrueRoll guarantees 100% ROI each year.

TrueRoll can often pay for itself in collected back taxes alone, but to understand the full ROI consider all of the benefits

- Collections**                      Back taxes collected from historically unqualified exemptions
- New Assessed Value**        The annual value of future tax revenue that is added to the tax roll by removing unqualified exemptions that would otherwise have been renewed.
- Efficiency Savings**            Value of staff time saved identifying and investigating properties using manual processes versus automated identification

The pricing table below describes the configuration options TCAD has requested:

<b>\$150,000/yr</b>	<b>MAPS Compliant Homestead Administration</b>
	Products & Services <b>TrueRoll Proactive Monitoring™ Phase One</b> <b>TrueRoll Application Vetter™ Paper</b>
	True Prodigy Data Integration
	TCAD specific configurations
	TrueRoll Customer Success Delivery Methodology™: Bi-weekly onboarding meetings, training, quarterly updates, live support

## Post Pilot Project Phases, Options and Billing Dates

<b>Phase: Initial</b> <b>MAPS Compliant Homestead Administration</b> TrueRoll Proactive Monitoring™ Phase One TrueRoll Application Vetter™ Paper	October 2025 - End of 2025	Annual fee, starting Jan 1 2026
<u>Annual Subscription Fee</u> \$150,000 / year \$0 setup cost if contract signed by June 30, 2025	<b>\$37,500</b>  <i>Calculated as \$150,000 @ 3 months. Pricing pro-rata to align billing to the CAD's budget year</i>	<b>\$150,000</b>

<b>Phase: Future</b> <b>End-to-End Homestead Administration™</b> TrueRoll Investigation Services TrueRoll Application Vetter™ Online Forms	October 2025 - End of 2025	Annual fee, starting as needed
<u>Investigation Services</u> 200 Investigation Reports per Year	\$0  <i>Not being considered for FY 2025</i>	<b>\$75,000</b>
<u>TrueRoll Application Vetter™</u> Phase: Initial deployment includes a paper-only deployment of Application Vetter™, Phase: Future extends the scope to both online and paper	\$0  <i>Not being considered for FY 2025</i>	<i>Upon request, bundling available.</i>  <i>Note: TCAD has the opportunity to sunset costs of their existing homestead application processing solution.</i>

### Procurement Options

- Pricing assumes direct contract with TrueRoll with no pass through costs
- DIR - NASPO Value Point Contract
- “Piggyback” off of previously bid, reciprocal agreement public RFP contracts
- ARPA Funds may be available to pay for some or all of TrueRoll costs



## **TRAVIS CENTRAL APPRAISAL DISTRICT BOARD OF DIRECTORS AGENDA ITEM DETAILS**

<b>Item</b>	5I: Discussion and possible action on purchase of residential property appraisal subscription through Omnia cooperative purchasing contract No. R240303
<b>Presenter</b>	Leana Mann, Chief Appraiser

### **Background Information**

With Texas being a nondisclosure sales state, it has historically been very challenging for appraisal districts to obtain the relevant data needed for mass appraisal. C3.AI has developed a subscription-based platform that allows CADs to review characteristic data for listed properties to ensure our records are accurate. From the application, the CAMA data will be ingested, and then the application will identify discrepancies in data at the field level. When data discrepancies are identified, the necessary changes can be updated back into the CAMA system.

The property appraisal subscription will also allow for statistical analysis of appraised values to identify equity maps and comparable properties for each parcel. The CAD will have the option to leverage machine learning for identifying trends among similar properties, identifying outliers, and creating equity comparisons. These comparisons will help verify the performance of the mass appraisal model and generate equity evidence for protests.

This application can also analyze market values produced by the CAD, create ratio studies, and other comparative outputs to identify statistical issues with the valuation methods. The ability to generate appropriate protest appeal packages that can be compared to the current CAMA evidence and used to supplement the current evidence with graphical and visual reports on a mass scale, which would require exorbitant staff time to create.

The application can also quickly provide a regression value that will be useful in comparing to the CAD values to determine market area and other segmentations that may be needed.

The District recommends contracting with C3.AI, using the Omnia cooperative purchasing contract number R240303 for a term of October 1, 2025 through September 30, 2031. While this will be a 7-year contract, the contract documents will include a non-appropriations clause, which will allow the contract to be cancelled if the subscription is not funded through the budget process.

Term	Subscription Fee	Implementation Fee	Total Cost
Year 1	\$ 150,000	\$ 17,857	\$ 167,857
Year 2	\$ 150,000	\$ 17,858	\$ 167,858
Year 3	\$ 150,000	\$ 17,859	\$ 167,859
Year 4	\$ 150,000	\$ 17,860	\$ 167,860
Year 5	\$ 150,000	\$ 17,861	\$ 167,861
Year 6	\$ 150,000	\$ 17,862	\$ 167,862
Year 7	\$ 150,000	\$ 17,863	\$ 167,863
<b>Total</b>	<b>\$ 1,050,000</b>	<b>\$ 125,020</b>	<b>\$ 1,175,020</b>

**Staff Recommendation & Motion Language**

The District recommends contracting with C3.ai, using the Omnia cooperative purchasing contract number R240303 for a term of October 1, 2025 through September 30, 2031 for a total annual cost of \$167,857.

*I move to authorize the purchase of the residential property appraisal subscription with C3.ai, using the Omnia cooperative purchasing contract for a term of October 1, 2025 through September 30, 2031, for a total annual cost of \$167,857.*

**PRICE QUOTATION**  
**CARAHSOFT TECHNOLOGY CORP**

11493 SUNSET HILLS ROAD | SUITE 100 | RESTON, VIRGINIA 20190  
 PHONE (703) 871-8500 | FAX (703) 871-8505 | TOLL FREE (888) 66CARAH  
 WWW.CARAHSOFT.COM | SALES@CARAHSOFT.COM



**TO:** Leana Mann  
 Travis Central Appraisal District  
 850 E Anderson Ln  
 Austin, TX 78752-1638 USA

**FROM:** Heather Castellanos  
 Carahsoft Technology Corp.  
 11493 Sunset Hills Road  
 Suite 100  
 Reston, Virginia 20190

**EMAIL:** LMann@tcadcentral.org

**EMAIL:** Heather.Castellanos@carahsoft.com

**PHONE:** (512) 834-9317

**PHONE:** (571) 662-3750

**TERMS:** OMNIA Software Solutions and Services contract: R240303  
 Term: January 1, 2025 - December 31, 2027  
 FTIN:52-2189693  
 Shipping Point: FOB Destination  
 Credit Cards: VISA/MasterCard/AMEX  
 Remit To: Same as Above  
 Payment Terms: Net 30 (On Approved Credit)  
 Sales Tax May Apply

**QUOTE NO:** 59990488  
**QUOTE DATE:** 09/08/2025  
**QUOTE EXPIRES:** 10/08/2025  
**RFQ NO:**  
**SHIPPING:** ESD  
**TOTAL PRICE:** \$1,174,999.00

**TOTAL QUOTE:** \$1,174,999.00

LINE NO.	PART NO.	DESCRIPTION	QUOTE PRICE	QTY	EXTENDED PRICE
1	C3-APP-RPA-01-1195	C3 AI Residential Property Appraisal Application - Annual subscription includes: - Up to 1,000,000 residential parcels - Unlimited end-user licenses - Unlimited vCPU usage (up to 1 valuation update per property per month) Year 1 C3.ai, Inc - C3-APP-RPA-01	\$167,857.00	COOP 1.	\$167,857.00
2	C3-APP-RPA-01-1195	C3 AI Residential Property Appraisal Application - Annual subscription includes: - Up to 1,000,000 residential parcels - Unlimited end-user licenses - Unlimited vCPU usage (up to 1 valuation update per property per month) Year 2 C3.ai, Inc - C3-APP-RPA-01	\$167,857.00	COOP 1.	\$167,857.00
3	C3-APP-RPA-01-1195	C3 AI Residential Property Appraisal Application - Annual subscription includes: - Up to 1,000,000 residential parcels - Unlimited end-user licenses - Unlimited vCPU usage (up to 1 valuation update per property per month) Year 3 C3.ai, Inc - C3-APP-RPA-01	\$167,857.00	COOP 1.	\$167,857.00
4	C3-APP-RPA-01-1195	C3 AI Residential Property Appraisal Application - Annual subscription includes: - Up to 1,000,000 residential parcels - Unlimited end-user licenses - Unlimited vCPU usage (up to 1 valuation update per property per month) Year 4 C3.ai, Inc - C3-APP-RPA-01	\$167,857.00	COOP 1.	\$167,857.00
5	C3-APP-RPA-01-1195	C3 AI Residential Property Appraisal Application - Annual subscription includes: - Up to 1,000,000 residential parcels - Unlimited end-user licenses - Unlimited vCPU usage (up to 1 valuation update per property per month) Year 5 C3.ai, Inc - C3-APP-RPA-01	\$167,857.00	COOP 1.	\$167,857.00

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6	C3-APP-RPA-01-1195	C3 AI Residential Property Appraisal Application - Annual subscription includes: - Up to 1,000,000 residential parcels - Unlimited end-user licenses - Unlimited vCPU usage (up to 1 valuation update per property per month) Year 6 C3.ai, Inc - C3-APP-RPA-01	\$167,857.00	COOP	1.	\$167,857.00
7	C3-APP-RPA-01-1195	C3 AI Residential Property Appraisal Application - Annual subscription includes: - Up to 1,000,000 residential parcels - Unlimited end-user licenses - Unlimited vCPU usage (up to 1 valuation update per property per month) Year 7 C3.ai, Inc - C3-APP-RPA-01	\$167,857.00	COOP	1.	\$167,857.00

**SUBTOTAL:** \$1,174,999.00

**TOTAL PRICE:** \$1,174,999.00

**TOTAL QUOTE:** \$1,174,999.00

- C3 AI Order Form is attached hereto and incorporated by reference.
- C3 AI's standard commercial end-user license agreement (EULA) and associated terms apply (<https://c3.ai/legal/>).
- Invoices for all subscriptions in full on the effective date of any order resulting from this quote.
- Invoicing: Invoicing to Customer shall be as follows: September 26th, 2025: \$167,857; (i) September 26th, 2026: \$167,857; (i) September 26th, 2027: \$167,857; (i) September 26th, 2028: \$167,857; (i) September 26th, 2029: \$167,857; (i) September 26th, 2030: \$167,857; (i) September 26th, 2031: \$167,857.
- THE PARTIES HEREBY AGREE THE CUSTOMER'S ACCEPTANCE OF THIS QUOTE SHALL BE DEEMED ACCEPTANCE OF THE TERMS AND CONDITIONS CONTAINED HEREIN IN THE ATTACHED ORDER FORM. THE PARTIES HEREBY AGREE THE CUSTOMER'S ACCEPTANCE OF THIS QUOTE SHALL BE DEEMED ACCEPTANCE OF THE TERMS AND CONDITIONS CONTAINED HEREIN AND THE ORDER FORM ATTACHED HERETO. IN THE EVENT OF CONFLICT BETWEEN THE TERMS AND CONDITIONS CONTAINED HEREIN AND THE TERMS AND CONDITIONS OF OMNIA CONTRACT#R24030, THE LATTER SHALL CONTROL.