

MARK LEWIS

TAX GRIEVANCE SERVICE, INC.

Complete the form below to the best of your ability

| | | | |
|---|------------------|-------------------------|-------------------------|
| Name of Homeowner | | | Social Security # |
| Address of Home | | City / State / Zip Code | |
| Home Phone | Business Phone | Cell Phone | Email Address |
| Mailing address of Owner (if different) | | | City / State / Zip Code |
| Inc. Village (if any): | School District: | Cross Street | Year Built |

| | | | |
|------------|-------------------------------------|------------------------------------|--|
| Home Style | <input type="checkbox"/> Cape | <input type="checkbox"/> Colonial | <input type="checkbox"/> Condo/Townhouse |
| | <input type="checkbox"/> High Ranch | <input type="checkbox"/> Ranch | <input type="checkbox"/> Splanch |
| | <input type="checkbox"/> Split | <input type="checkbox"/> Victorian | <input type="checkbox"/> Other: |

| | | | | | | | |
|-----------------|---------|------------|-------------|------------|-----------|----------|-----------|
| Approx. sq. ft. | # Rooms | # Bedrooms | # Bathrooms | # Kitchens | # Stories | Lot Size | Condition |
|-----------------|---------|------------|-------------|------------|-----------|----------|-----------|

| | | | | | | | |
|-------------|--|-------------|--|--------------|--|---------------|--|
| Waterfront: | <input type="checkbox"/> Yes <input type="checkbox"/> No | Water view: | <input type="checkbox"/> Yes <input type="checkbox"/> No | Central Air: | <input type="checkbox"/> Yes <input type="checkbox"/> No | # Fireplaces: | |
|-------------|--|-------------|--|--------------|--|---------------|--|

| | | | | | |
|-----------|--|--|---|-----------------|--|
| Basement: | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Full <input type="checkbox"/> Partial | <input type="checkbox"/> Finished <input type="checkbox"/> Unfinished | In-ground pool: | <input type="checkbox"/> Yes <input type="checkbox"/> No |
|-----------|--|--|---|-----------------|--|

| | | | |
|---------|--|--------------|-------------|
| Garage: | <input type="checkbox"/> Yes <input type="checkbox"/> No | Garage Size: | <i>cars</i> |
|---------|--|--------------|-------------|

| | | | | | |
|---|--|------------------|--|--------------------------|--|
| Purchase Date: | | Purchase Amount: | | Do you live in the home? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Was this a foreclosure, distress, estate, short, family sale? | | | <input type="checkbox"/> Yes <input type="checkbox"/> No | | |
| Any negative aspects of your home that might affect its value? | | | <input type="checkbox"/> Yes <input type="checkbox"/> No | | |
| Property offered for sale within last 3 years? | <input type="checkbox"/> Yes <input type="checkbox"/> No | For Sale Date: | | Asking price: | |
| What do you believe the property and home are worth (market value)? | | | | | |
| Did you read and sign the authorization accompanying this form? | | | <input type="checkbox"/> Yes <input type="checkbox"/> No | | |

If you are moving or planning to move, please fill out below so we can expedite any refund that may be due you. Once you have a forwarding address it is YOUR responsibility to inform us.

| | | |
|-------------|----------------|-------------|
| New address | Effective date | New Phone # |
|-------------|----------------|-------------|

Please return the completed form and signed authorization to our office

| | | | |
|-------|---|---------------|-----------------------|
| Mail: | Mark Lewis Tax Grievance Service 540 Horseblock Road Suite 2 Farmingville, NY 11738 | Fax: | 631.696.5844 |
| | | Email: | Info@marklewistax.com |
| | | Apply Online: | www.marklewistax.com |

CONTRACT CONDITIONS

I agree to the following conditions:

1. The Mark Lewis Tax Grievance Service, Inc. is not a government agency and is not affiliated with any government agency.
2. The Mark Lewis Tax Grievance Service, Inc. will furnish me with my property's full valuation, based on my total assessment upon request. I alone determined that my property had a lesser value than my township is claiming.
3. I am fully aware of the fact that I myself may receive a tax assessment reduction through my own efforts, but I elect to employ The Mark Lewis Tax Grievance Service, Inc.
4. I understand that The Mark Lewis Tax Grievance Service, Inc. will make reasonable efforts to fully communicate an offer of settlement made to them by the township in course of a tax assessment review proceeding, other than a hearing or a trial, with respect to the affected parcel of real estate. I am aware that in many cases offers are made where it is imperative to make a decision immediately. I fully authorize The Mark Lewis Tax Grievance Service, Inc. and their agents to fully negotiate a settlement for me.
5. At anytime, within three (3) days, after entering into this contract, I have the complete right to cancel. Cancellation must be in writing and sent to the Mark Lewis Tax Grievance Service, Inc., via certified mail in that three (3) day period.
6. "Only: 1. a person named in the records of Suffolk County Clerk as a homeowner; or 2. that person's authorized agent; or 3. a person who has contracted to buy the home; or 4. the estate of a deceased homeowner, is eligible under law to receive a tax assessment reduction and a property tax refund. If you are not in any of these four categories, you will not be able to receive a property tax refund and you should not sign this agreement."
7. If the home is sold prior to finalization of the grievance, the seller is responsible for fees incurred unless the new homeowner assumes responsibility of the grievance by signing our authorization form.

I fully understand that there are NO (NONE) fees or disbursements to be paid by me prior to The Mark Lewis Tax Grievance Service, Inc., filing my grievance. If the grievance is denied at grievance level and small claims level, The Mark Lewis Tax Grievance Service, Inc., is responsible for all court fees and disbursements and I will not be obligated to pay anything. When the assessment is reduced as a result of the process initiated by The Mark Lewis Tax Grievance Service, Inc., I agree to pay the following:

- A. FEES: I have engaged The Mark Lewis Tax Grievance Service, Inc., 540 Horseblock Rd. Suite 2, Farmingville, NY 11738, as sole and exclusive agent, to obtain a reduction of the assessed value of my property. I agree to pay them a FEE equal to 50% of the reduction prior to exemptions for my 2021/2022 property taxes. The fee is due by due date indicated on invoice. A copy of the official decision reporting the reduction of my property's assessed value will accompany the invoice. The tax reduction amount is calculated by multiplying the amount that the property's total assessed value is reduced by the tax rate for the 2021/2022 tax bill for the tax district in which the property is located prior to exemptions.
- B. I agree to pay a \$75 appraisal fee (upon winning grievance only). This fee will be waived if I supply a certified appraisal dated no more than 1 year prior to grievance day. I will supply this appraisal to The Mark Lewis Tax Grievance Service, Inc. no later than May 1, 2021. On any reduction obtained in small claims court, the \$30 court fee will be applied to the amount due to The Mark Lewis Tax Grievance Service, Inc.
- C. If I fail to pay the above fees within 30 days of notification, I agree to pay reasonable attorney fees if applicable to The Mark Lewis Tax Grievance Service, Inc. I am aware that interest, at a rate of 1.5% per month on any unpaid balance will be added to my bill 31 days from the invoice date.
- D. All fees are payable within 30 days of The Mark Lewis Tax Grievance Service, Inc. receipt of the official notification of reduction. If balance left unpaid, fees may be deducted from any county refund checks at The Mark Lewis Tax Grievance Service, Inc. sole discretion. This agreement is not assignable except by prior written agreement between the parties.

Any part of this contract that is deemed unlawful does not void the remaining parts of this contract

AUTHORIZATION: DESIGNATION OF REPRESENTATIVE

I, (Print Name) _____, as petitioner (or officer thereof) hereby designate The Mark Lewis Tax Grievance Service, Inc., to act as my sole representative in any and all proceedings before the Board of Assessment Review and/or Small Claims assessment review of the Supreme Court, and any other proceeding pursuant to New York State Real Property Tax Law for the purpose of reviewing the assessment of my real property as it appears on the most recent assessment roll of any assessing unit for my property. This case will be submitted in May 2021.

I have fully read, understand and agree to the terms and conditions of this contract.

Print Address Here _____

Signature (any owner) X _____

Dated _____ Current Phone Number _____