



COMPLIANCE WITH STATEMENT OF BENEFITS
REAL ESTATE IMPROVEMENTS

State Form 51766 (R3 / 2-13)
Prescribed by the Department of Local Government Finance

CONFIDENTIAL

20 18 PAY 20 19
FORM CF-1 / Real Property

PRIVACY NOTICE
The cost and any specific individual's salary information is confidential; the balance of the filing is public record per IC 6-1.1-12.1-5.1 (c) and (d).

FILED

MAY 15 2019

CITY CLERK

INSTRUCTIONS:

- 1. This form does not apply to property located in a residentially distressed area or any deduction for which the Statement of Benefits was approved before July 1, 1991.
2. Property owners must file this form with the county auditor and the designating body for their review regarding the compliance of the project with the Statement of Benefits (Form SB-1/Real Property).
3. This form must accompany the initial deduction application (Form 322/RE) that is filed with the county auditor.
4. This form must also be updated each year in which the deduction is applicable. It is filed with the county auditor and the designating body before May 15, or by the due date of the real property owner's personal property return that is filed in the township where the property is located. (IC 6-1.1-12.1-5.1(b))
5. With the approval of the designating body, compliance information for multiple projects may be consolidated on one (1) compliance form (Form CF-1/Real Property).

SECTION 1 TAXPAYER INFORMATION

Table with 2 columns: Taxpayer Information and County. Includes fields for Name of taxpayer (George Bittar, Providence Medical Group, LLC), County (Vigo), Address of taxpayer (2723 S 7th Street, Terre Haute, IN 47802), DLGF taxing district number (84002), Name of contact person (Virginia Hayes), and Telephone number ((812) 232-8164).

SECTION 2 LOCATION AND DESCRIPTION OF PROPERTY

Table with 3 columns: Designating Body, Resolution Number, and Dates. Includes fields for Name of designating body (Common Council of the City of Terre Haute), Resolution number (13-2006), Estimated start date (July 1, 2006), Actual start date (July 1, 2006), Description of real property improvements (Construction of building for use as a multi-speciality medical facility to 33,000 +/- square feet), Estimated completion date (July 1, 2007), and Actual completion date (August 1, 2007).

SECTION 3 EMPLOYEES AND SALARIES

Table with 4 columns: Category, AS ESTIMATED ON SB-1, and ACTUAL. Rows include Current number of employees (270 vs 242), Salaries (7,000,000.00 vs 17,051,577.05), Number of employees retained (270 vs 242), Salaries (7,000,000.00 vs 17,051,577.05), Number of additional employees (40 vs 0), and Salaries (2,800,000.00 vs 0.00).

SECTION 4 COST AND VALUES

Table with 3 columns: AS ESTIMATED ON SB-1, COST, and ASSESSED VALUE. Rows include Values before project, Plus: Values of proposed project, Less: Values of any property being replaced, and Net values upon completion of project for both AS ESTIMATED and ACTUAL.

SECTION 5 WASTE CONVERTED AND OTHER BENEFITS PROMISED BY THE TAXPAYER

Table with 4 columns: Category, AS ESTIMATED ON SB-1, and ACTUAL. Rows include Amount of solid waste converted, Amount of hazardous waste converted, and Other benefits.

SECTION 6 TAXPAYER CERTIFICATION

I hereby certify that the representations in this statement are true. Signature of authorized representative (handwritten), Title (President), Date signed (5-10-19).

**OPTIONAL: FOR USE BY A DESIGNATING BODY WHO ELECTS TO REVIEW THE COMPLIANCE WITH STATEMENT OF BENEFITS (FORM CF-1)
THAT WAS APPROVED AFTER JUNE 30, 1991**

INSTRUCTIONS: (IC 6-1.1-12.1-5.1 and IC 6-1.1-12.1-5.9)

1. Not later than forty-five (45) days after receipt of this form, the designating body may determine whether or not the property owner has substantially complied with the Statement of Benefits (Form SB-1/Real Property).
2. If the property owner is found **NOT** to be in substantial compliance, the designating body shall send the property owner written notice. The notice must include the reasons for the determination and the date, time and place of a hearing to be conducted by the designating body. The date of this hearing may not be more than thirty (30) days after the date this notice is mailed. A copy of the notice may be sent to the county auditor and the county assessor.
3. Based on the information presented at the hearing, the designating body shall determine whether or not the property owner has made reasonable efforts to substantially comply with the Statement of Benefits (Form SB-1/Real Property) and whether any failure to substantially comply was caused by factors beyond the control of the property owner.
4. If the designating body determines that the property owner has **NOT** made reasonable efforts to comply, then the designating body shall adopt a resolution terminating the property owner's deduction. If the designating body adopts such a resolution, the deduction does not apply to the next installment of property taxes owed by the property owner or to any subsequent installment of property taxes. The designating body shall immediately mail a certified copy of the resolution to: (1) the property owner; (2) the county auditor; and (3) the county assessor.

We have reviewed the CF-1 and find that:			
<input type="checkbox"/> the property owner IS in substantial compliance			
<input type="checkbox"/> the property owner IS NOT in substantial compliance			
<input type="checkbox"/> other (specify) _____			
Reasons for the determination (attach additional sheets if necessary)			
Signature of authorized member			Date signed (month, day, year)
Attested by:		Designating body	
If the property owner is found not to be in substantial compliance, the property owner shall receive the opportunity for a hearing. The following date and time has been set aside for the purpose of considering compliance. (Hearing must be held within thirty (30) days of the date of mailing of this notice.)			
Time of hearing	<input type="checkbox"/> AM <input type="checkbox"/> PM	Date of hearing (month, day, year)	Location of hearing
HEARING RESULTS (to be completed after the hearing)			
<input type="checkbox"/> Approved		<input type="checkbox"/> Denied (see instruction 4 above)	
Reasons for the determination (attach additional sheets if necessary)			
Signature of authorized member			Date signed (month, day, year)
Attested by:		Designating body	
APPEAL RIGHTS [IC 6-1.1-12.1-5.9(e)]			
A property owner whose deduction is denied by the designating body may appeal the designating body's decision by filing a complaint in the office of the Circuit or Superior Court together with a bond conditioned to pay the costs of the appeal if the appeal is determined against the property owner.			



**STATEMENT OF BENEFITS
REAL ESTATE IMPROVEMENTS**
State Form 51167 (2-17-05)
Prescribed by the Department of Local Government Finance

FORM SB-17RE

INSTRUCTIONS

- The application must be submitted to the body designating the Economic Revitalization Area prior to any public hearing (the designating body requires information from the applicant in making its decision about whether to designate an Economic Revitalization Area. Complete full statement must be submitted to the designating body BEFORE the rededication or rehabilitation of real property for which the person wishes to claim a deduction. Projects planned or completed to after July 1, 1997, and areas designated after July 1, 1997, require a STATEMENT OF BENEFITS. (IC 5-1-1-12.1)
- Approval of the designating body (City Council, Town Board, County Council, etc.) must be obtained prior to initiation of the rededication or rehabilitation. BEFORE a deduction may be approved.
- To obtain a deduction, Form 51167, Application for Deduction from Increased Valuation of Structures in Economic Revitalization Areas, must be filed with the County Auditor by the later of (1) May 15, or (2) 180 days after the date of addition to assessed valuation or new assessment is mailed to the property owner at the address shown on the records of the township assessor.
- Property owners whose Statement of Benefits was approved after June 30, 1991, must submit Form SB-17RE annually to show compliance with the Statement of Benefits. (IC 5-1-1-12.1-5, 11(b))
- The schedules established under IC 5-1-1-12.1-4(d) effective July 1, 2000, apply to any statement of benefits filed on or after July 1, 2000. The schedules effective prior to July 1, 2000, shall continue to apply to those statements of benefits filed before July 1, 2000.

APPLICANT INFORMATION					
Name of taxpayer George B. Bittar, M.D.					
Address of taxpayer (number and street, city, state, and ZIP code) 2723 South 7th Street, Terre Haute, IN 47802					
Name of contact person Luis F. Britton, Attorney				Telephone number (812) 252-6003	
PROPERTY INFORMATION					
Name of designating body Common Council of the City of Terre Haute				Recitation number 13-2005	
Location of property 2723 South 7th Street, Terre Haute				County Vigo	
Description of real property improvements, rededication, or rehabilitation (use estimated value if necessary) Construction of building for use as a multi-specialty medical facility to 33,000 square feet. For real estate description, see Exhibit A.				ESTIMATED	
				Start Date SUMMER 2006	Completion Date SUMMER 2007
Construction 270	Value 7,000,000.00	Nonresidential 270	Value 7,000,000	Months residential 40	Value 2,800,000.00
NOTE: Pursuant to IC 5-1-1-12.1-5.1 (b) (2) the COST of the property is considered			REAL ESTATE IMPROVEMENTS		
			COST		ASSESSED VALUE
Current values			[REDACTED]		1,500,000.00
Plus estimated values of proposed project			[REDACTED]		4,000,000.00
Less values of any property being replaced			[REDACTED]		0.00
Net estimated values upon completion of project			[REDACTED]		X
Estimated solid waste converted (tons)			Estimated hazardous waste converted (pounds)		
Other benefits					
I hereby certify that the representations in this statement are true.					
Signature of applicant <i>George B. Bittar</i>				Date signed (month, day, year) 6-29-06	

2013-14 BUDGET DESIGNATION

We have reviewed our prior actions relating to the designation of this Economic Revitalization Area and find that the applicant meets the general standards adopted in the resolution previously approved by the body. Said resolution, passed under IC 6-1.1-12.1-2.5, provides for the following limitations as authorized under IC 6-1.1-12.1-2.

- A. The designated area has been limited to a period of time not to exceed 10 calendar years (see below). The date this designation expires is 2016.
- B. The type of deduction that is allowed in the designated area is limited to:
 - 1. Redevelopment or rehabilitation of real estate improvements; Yes No
 - 2. Essentially distressed areas; Yes No.
- C. The amount of deduction applicable to redevelopment or rehabilitation is limited to \$ _____ cost with an assessed value of \$ 545,319.98.
- D. Other limitations or conditions (specify) _____
- E. The deduction for redevelopment or rehabilitation is allowed for 10 years* (see below).

Also we have reviewed the information contained in the statement of benefits and find that the estimates and expectations are reasonable and have determined that the totality of benefits is sufficient to justify the deduction described above. (IC 6-1.1-12.3(b))

Approved by (signature) <u>George Azar</u> FOR PRESIDENT	Telephone number <u>812-232-3375</u>	Date signed (month, day, year) <u>8-10-2006</u>
Related by (signature) <u>Charles P. Healy</u>	Designated body <u>CITY COUNCIL</u>	

* If the designating body limits the time period during which an area is an economic revitalization area, it does not limit the length of time a taxpayer is entitled to receive a deduction to a number of years designated under IC 6-1.1-12.1-4.

For essentially distressed areas, the deduction period may not exceed five (5) years. If the Economic Revitalization Area was designated prior to July 1, 2000, the deduction period is limited to three (3), six (6), or ten (10) years. For EPAs after June 30, 2000, the deduction period may not exceed ten (10) years. An area designated as an urban development area pursuant to an application filed after December 31, 1978, and prior to January 1, 1986, are entitled to a ten (10) year deduction.