

IFB 2016-184

**Tax Statement Preparation
and Mailing Service**

LEGAL NOTICE

By order of the Commissioners' Court of Collin County, Texas, sealed bids will be received by the Purchasing Agent, 2300 Bloomdale, Suite 3160, McKinney, TX 75071, until **2:00 P.M., Thursday, May 19, 2016**, for Invitation to Bid **Tax Statement Preparation and Mailing Services (IFB No. 2016-184)**. Bidders shall use unit pricing. Funds for payment have been provided through the Collin County budget approved by the Commissioner's Court for this fiscal year only. Bidders may obtain detailed specifications and other documents at Office of the Purchasing Agent: Collin County Administration Building, 2300 Bloomdale, Suite 3160, McKinney, TX 75071, 972-548-4165, or by going to: <http://collincountytx.ionwave.net>. Sealed bids will be opened on **Thursday, May 19, 2016 at 2:00 P.M.** by the Purchasing Agent, 2300 Bloomdale, Suite 3160, McKinney, TX 75071. The Commissioners' Court reserves the right to reject any and all bids.

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ATTENTION:	CLASSIFIEDS
BILL TO:	ACCOUNT NO 06100315-000
	COMMISSIONER'S COURT

NOTICE TO PUBLISHERS: Please publish in your issue on **Thursday, April 28, 2016, and Thursday, May 5, 2016**. A copy of this notice and the publisher's affidavit must accompany the invoice when presented for payment.

NEWSPAPER:	<u>Plano Star Courier</u>
DATE:	<u>April 25, 2016</u>
FAX:	<u>972-529-1684</u>

Collin County, Texas

Bid Information

Bid Owner Courtney Wilkerson Senior Buyer
Email cwilkerson@co.collin.tx.us
Phone (972) 548-4113
Fax (972) 548-4694

Bid Number 2016-184
Title Tax Statement Preparation and Mailing Services
Bid Type IFB
Issue Date 04/26/2016
Close Date 5/19/2016 02:00:00 PM (CT)

Contact Information

Address 2300 Bloomdale Rd.
Ste. 3160
McKinney, TX 75071

Contact Courtney Wilkerson Senior Buyer
Department Purchasing
Building Admin. Building
Floor/Room Ste.3160
Telephone (972) 548-4113
Fax (972) 548-4694
Email cwilkerson@co.collin.tx.us

Ship to Information

Address 2300 Bloomdale Rd.
Ste. 2366
McKinney, TX 75071

Contact
Department Tax Office
Building Admin. Building
Floor/Room Ste. 2366
Telephone
Fax
Email

Supplier Information

Company Name _____
Contact Name _____
Address _____

Telephone _____
Fax _____
Email _____

Supplier Notes

The undersigned hereby certifies the foregoing bid submitted by the company listed below hereinafter called "bidder" is the duly authorized agent of said company and the person signing said bid has been duly authorized to execute same. Bidder affirms that they are duly authorized to execute this contract; this company; corporation, firm, partnership or individual has not prepared this bid in collusion with any other bidder or other person or persons engaged in the same line of business; and that the contents of this bid as to prices, terms and conditions of said bid have not been communicated by the undersigned nor by any employee or agent to any other person engaged in this type of business prior to the official opening of this bid.

Signature _____

Date ____ / ____ / ____

Bid Notes

Please login to view documents. The intended use/purpose for this Invitation for Bid is for various printing jobs required by the Tax Assessor Collector Departments. Any questions related to this IFB shall be directed to Courtney Wilkerson, cwilkerson@co.collin.tx.us.

Bid Activities

Date	Name	Description
5/13/2016 05:00:00 PM (CT)	Deadline to Submit Questions	Deadline to submit questions is 5:00 p.m., Friday, May 13, 2016. Please email all questions to cwilkerson@co.collin.tx.us.
5/13/2016 05:00:00 PM (CT)	Intent to Submit Bid	Do you intend to submit a bid?

Bid Messages

Bid Attachments

The following attachments are associated with this opportunity and will need to be retrieved separately

Line	Filename	Description
Header	LEGAL NOTICE-TAX STATEMENT PREPARATION AND MAILING SERVICES.pdf	Legal Notice
Header	General Instructions_Bid.docx	General Instructions_Bid
Header	Terms of Contract_Bid.docx	Terms of Contract - Bid
Header	Insurance.doc	Insurance
Header	IFB-Tax Statement Preparation and Mailing Specs-FINAL.pdf	IFB-Tax Statement Preparation and Mailing Specs-FINAL
Header	Attachment A, Line Item 1-Property Tax Notification Statement.pdf	Attachment A, Line Item 1-Property Tax Notification Statement
Header	Attachment B, Line Item 1-Property Tax Statement (Homeowner) Page 1-front and back.pdf	Attachment B, Line Item 1-Property Tax Statement (Homeowner) Page 1-front and back
Header	Attachment C, Line Item 1-Property Tax Statement (Homeowner) Page 2-front and back.pdf	Attachment C, Line Item 1-Property Tax Statement (Homeowner) Page 2-front and back
Header	Attachment D, Line Item 1-Property Tax Statement (Mortgage Company) Page 1-front and back.pdf	Attachment D, Line Item 1-Property Tax Statement (Mortgage Company) Page 1-front and back
Header	Attachment E, Line Item 1-Property Tax Statement (Mortgage Company) Page 2-front and back.pdf	Attachment E, Line Item 1-Property Tax Statement (Mortgage Company) Page 2-front and back
Header	Attachment F, Line Item 2-February Statement-Blue.pdf	Attachment F, Line Item 2-February Statement-Blue
Header	Attachment G, Line Item 3-May Statement-Pink-Page 1.pdf	Attachment G, Line Item 3-May Statement-Pink-Page 1
Header	Attachment H, Line Item 3-May Statement-Page 2.pdf	Attachment H, Line Item 3-May Statement-Page 2
Header	Attachment I, Line Item 4-July Statement-Mint Green-Attorney.pdf	Attachment I, Line Item 4-July Statement-Mint Green-Attorney
Header	Attachment J, #9 non-standard return envelope.pdf	Attachment J, #9 non-standard return envelope
Header	Attachment K, #10 Window Mailing Envelopes blue (front).pdf	Attachment K, #10 Window Mailing Envelopes blue (front)
Header	Attachment L, #10 Window Mailing Envelopes blue (back side).pdf	Attachment L, #10 Window Mailing Envelopes blue (back side)
Header	Information_Regarding_Conflict_of_Interest_Questionnaire-.pdf	Information Regarding Conflict of Interest Questionnaire
Header	CIQ_113015.pdf	Conflict of Interest Questionnaire

Bid Attributes

Please review the following and respond where necessary

#	Name	Note	Response
1	Delivery	<p>Delivery will be F.O.B. inside delivery at Collin County designated locations and all transportation charges are to be paid by the supplier to destination.</p> <p>Please state delivery in calendar days from date of order.</p>	_____ (Required)
2	Exceptions	<p>Do you take exceptions to the specifications. If so, by separate attachment, please state your exceptions. Valid Responses: [Please Select], Yes, No</p>	_____ (Required)
3	Insurance	<p>I understand that the insurance requirements of this solicitation are required and a certificate of insurance shall be submitted to the Purchasing department if I am awarded all or a portion of the resulting contract.</p> <p>Please initial.</p>	_____ (Required)
4	Subcontractors	<p>State the business name of all subcontractors and the type of work they will be performing under this contract.</p> <p>If you are fully qualified to self-perform the entire contract, please respond with "Not Applicable-Self Perform".</p>	_____ (Required)
5	Reference No. 1	<p>List a company or governmental agency where these same/like products /services, as stated herein, have been provided.</p> <p>Include the following: Company/Entity, Contact, Address, City/State/Zip, Phone, and E-Mail.</p>	_____ (Required)
6	Reference No. 2	<p>List a company or governmental agency where these same/like products /services, as stated herein, have been provided.</p> <p>Include the following: Company/Entity, Contact, Address, City/State/Zip, Phone, and E-Mail.</p>	_____ (Required)
7	Reference No. 3	<p>List a company or governmental agency where these same/like products /services, as stated herein, have been provided.</p> <p>Include the following: Company/Entity, Contact, Address, City/State/Zip, Phone, and E-Mail.</p>	_____ (Required)

- 8 Cooperative Contracts _____ (Required)
- As permitted under Title 8, Chapter 271, Subchapter F, Section 271.101 and 271.102 V.T.C.A. and Title 7, Chapter 791, Subchapter C, Section 791.025, V.T.C.A., other local governmental entities may wish to also participate under the same terms and conditions contained in this contract. Each entity wishing to participate must enter into an inter-local agreement with Collin County and have prior authorization from vendor. If such participation is authorized, all purchase orders will be issued directly from and shipped directly to the local governmental entity requiring supplies/services. Collin County shall not be held responsible for any orders placed, deliveries made or payment for supplies/services ordered by these entities. Each entity reserves the right to determine their participation in this contract.
- Would bidder be willing to allow other local governmental entities to participate in this contract, if awarded, under the same terms and conditions?
Valid Responses: [Please Select], Yes, No
- 9 Preferential Treatment _____ (Required)
- The County of Collin, as a governmental agency of the State of Texas, may not award a contract to a nonresident bidder unless the nonresident's bid is lower than the lowest bid submitted by a responsible Texas resident bidder by the same amount that a Texas resident bidder would be required to underbid a nonresident bidder to obtain a comparable contract in the state in which the nonresident's principal place of business is located (Government Code, Title 10, V.T.C.A., Chapter 2252, Subchapter A).
1. Is your principal place of business in the State of Texas?
 2. If your principal place of business is not in Texas, in which State is your principal place of business?
 3. If your principal place of business is not in Texas, does your state favor resident bidders (bidders in your state) by some dollar increment or percentage?
 4. If your state favors resident bidders, state by what dollar amount or percentage.
- 10 Debarment Certification _____ (Required)
- I certify that neither my company nor an owner or principal of my company has been debarred, suspended or otherwise made ineligible for participation in Federal Assistance programs under Executive Order 12549, "Debarment and Suspension," as described in the Federal Register and Rules and Regulations.
- Please initial.
- 11 Immigration and Reform Act _____ (Required)
- I declare and affirm that my company is in compliance with the Immigration and Reform Act of 1986 and all employees are legally eligible to work in the United States of America.
- I further understand and acknowledge that any non-compliance with the Immigration and Reform Act of 1986 at any time during the term of this contract will render the contract voidable by Collin County.
- Please initial.

12 Disclosure of Certain Relationships

Chapter 176 of the Texas Local Government Code requires that any vendor considering doing business with a local government entity disclose the vendor's affiliation or business relationship that might cause a conflict of interest with a local government entity. Subchapter 6 of the code requires a vendor to file a conflict of interest questionnaire (CIQ) if a conflict exists. By law this questionnaire must be filed with the records administrator of Collin County no later than the 7th business day after the date the vendor becomes aware of an event that requires the statement to be filed. A vendor commits an offense if the vendor knowingly violates the code. An offense under this section is a misdemeanor.

_____ (Required)

By submitting a response to this request, the vendor represents that it is in compliance with the requirements of Chapter 176 of the Texas Local Government Code.

Please send completed forms to the Collin County County Clerk's Office located at 2300 Bloomdale Rd., Suite 2104, McKinney, TX 75071.

Please initial.

13 Disclosure of Interested Parties

Section 2252.908 of the Texas Government Code requires a business entity entering into certain contracts with a governmental entity to file with the governmental entity a disclosure of interested parties at the time the business entity submits the signed contract to the governmental entity. Section 2252.908 requires the disclosure form (Form 1295) to be signed by the authorized agent of the contracting business entity, acknowledging that the disclosure is made under oath and under penalty of perjury. Section 2252.908 applies only to a contract that requires an action or vote by the governing body of the governmental entity before the contract may be signed or has a value of at least \$1 million. Section 2252.908 provides definitions of certain terms occurring in the section.

_____ (Required)

Section 2252.908 applies only to a contract entered into on or after January 1, 2016.

Please initial.

14 Notification Survey

In order to better serve our offerors, the Collin County Purchasing Department is conducting the following survey. We appreciate your time and effort expended to submit your bid. Should you have any questions or require more information please call (972) 548-4165.

_____ (Required)

How did you receive notice of this request?
Valid Responses: [Please Select], Plano Star Courier, Plan Room, Collin County eBid Notification, Collin County Website, Other

15 Bidder Acknowledgement

Bidder acknowledges, understands the specifications, any _____ (Required) and all addenda, and agrees to the bid terms and conditions and can provide the minimum requirements stated herein. Bidder acknowledges they have read the document in its entirety, visited the site, performed investigations and verifications as deemed necessary, is familiar with local conditions under which work is to be performed and will be responsible for any and all errors in Bid submittal resulting from Bidder's failure to do so. Bidder acknowledges the prices submitted in this Bid have been carefully reviewed and are submitted as correct and final. If Bid is accepted, vendor further certifies and agrees to furnish any and all products upon which prices are extended at the price submitted, and upon conditions in the specifications of the Invitation for Bid.

Please initial.

Line Items

#	Qty	UOM	Description	Response
1	363,864	each	<p>Line item #1 - Original October Mailing: Cost per statement must include 8 1/2" x 11" one page perforated printed front and back form, black ink on 24 lb. color paper or color printing on 24 lb. white paper (ink/paper color to be determined). There will be two envelopes - one for sending statements (#10 window envelopes, sample attached) with printing on both sides and one for returning (#9 non-standard envelope, sample attached). One insert shall be included with the statement. The insert shall be 8.5" x 11" printed on both sides on white paper in black or multicolored ink with information provided by the County. Vendor must convert a flat file, reformatting the file for a production file. All costs of programming must be included in the per statement price quoted. The statement number must also be converted to bar code and Optical Character Recognition (OCR) on the bottom portion of the statement. For proofing purposes Collin County requires the first 500 statements of residents whose last name start with the letters "M" and "B".</p> <p>TYPES OF MAILINGS: All line-item pricing shall include the printing of: statements (front & back), carrier envelopes, reply envelopes and letter inserts (front & back). It shall also include: data processing, image capturing on CD and microfiche, inserting letters, and delivery to U.S. Postal Service for one mailing.</p> <p>There are three different types of statements for the original mailing:</p> <ul style="list-style-type: none">-Original owner statement - approximately 203,437.-Mortgage Company statement - approximately 11,497.-Notification statement to owner - approximately 148,930. Mortgage Company receives either a mortgage company statement or taped version at their request. <p>Please note quantities are approximate, vendor to invoice on actual number of statements.</p>	\$ _____

Supplier Notes: _____

2	1		<p>Line Item #2 - February Delinquent Mailing: one page on 20 lb. blue paper with black ink. There will be one insert letter and two envelopes - one for sending statements (#10 window envelopes, sample attached) with printing on both sides and one for returning (#9 non-standard envelope, sample attached). Vendor must convert a flat file, reformatting the file for a production file. All costs of programming must be included in the per statement price quoted. The statement number must be converted to bar code and Optical Character Recognition (OCR) on the bottom portion of the statement. There will be approximately 34,000 late notices. TYPES OF MAILINGS: All line-item pricing shall include the printing of: statements (front & back), carrier envelopes, reply envelopes and letter inserts (front & back). It shall also include: data processing, image capturing on CD and microfiche, inserting letters, and delivery to U.S. Postal Service for one mailing. Please note quantities are approximate, vendor to invoice on actual number of statements.</p>	\$ _____
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Supplier Notes: _____

3 18,000 each Line Item #3 – May Delinquent Mailing: one page on 20 lb. pink paper with black ink. There will be one insert letter and two envelopes - one for sending statements (#10 window envelopes, sample attached) with printing on both sides and one for returning (#9 non-standard envelope, sample attached). Vendor must convert a flat file, reformatting the file for a production file. All costs of programming must be included in the per statement price quoted. The statement number must be converted to bar code and Optical Character Recognition (OCR) on the bottom portion of the statement. There will be approximately 18,000 late notices. TYPES OF MAILINGS: All line-item pricing shall include the printing of: statements (front & back), carrier envelopes, reply envelopes and letter inserts (front & back). It shall also include: data processing, image capturing on CD and microfiche, inserting letters, and delivery to U.S. Postal Service for one mailing. Please note quantities are approximate, vendor to invoice on actual number of statements. \$ _____

Supplier Notes: _____

4 13,500 each Line Item #4 – July Attorney Letter: one page on 20 lb. green paper with black ink. Letters will be printed and sent to County attorneys on an as needed basis (to be determined at a later date). No postage, envelopes or mailing of the letters are necessary for this line-item. The statement number must be converted to bar code and Optical Character Recognition (OCR) on the bottom portions of the statement. All letters are to be submitted to the County attorneys. There will be approximately 13,500 notices. TYPES OF MAILINGS: All line-item pricing shall include the printing of: statements (front & back), carrier envelopes, reply envelopes and letter inserts (front & back). It shall also include: data processing, image capturing on CD and microfiche, inserting letters, and delivery to U.S. Postal Service for one mailing. Please note quantities are approximate, vendor to invoice on actual number of statements. \$ _____

Supplier Notes: _____

1.0 GENERAL INSTRUCTIONS

1.0.1 Definitions

1.0.1.1 Bidder: refers to submitter.

1.0.1.2 Vendor/Contractor/Provider: refers to a Successful Bidder/Contractor/Service Provider.

1.0.1.3 Submittal: refers to those documents required to be submitted to Collin County, by a Bidder.

1.0.1.4 IFB: refers to Invitation For Bid.

1.1 If Bidder does not wish to submit an offer at this time, please submit a No Bid.

1.2 Awards shall be made not more than ninety (90) days after the time set for opening of submittals.

1.3 Collin County is always conscious and extremely appreciative of your time and effort in preparing your submittal.

1.4 Collin County exclusively uses ionWave Technologies, Inc. (Collin County eBid) for the notification and dissemination of all solicitations. The receipt of solicitations through any other company may result in your receipt of incomplete specifications and/or addendums which could ultimately render your bid non-compliant. Collin County accepts no responsibility for the receipt and/or notification of solicitations through any other company.

1.5 A bid may not be withdrawn or canceled by the bidder prior to the ninety-first (91st) day following public opening of submittals and only prior to award.

1.6 It is understood that Collin County, Texas reserves the right to accept or reject any and/or all Bids for any or all products and/or services covered in an Invitation For Bid (IFB), and to waive informalities or defects in submittals or to accept such submittals as it shall deem to be in the best interest of Collin County.

1.7 All IFB's submitted in hard copy paper form shall be submitted in a sealed envelope, plainly marked on the outside with the IFB number and name. A hard copy paper form submittal shall be manually signed in ink by a person having the authority to bind the firm in a contract. Submittals shall be mailed or hand delivered to the Collin County Purchasing Department.

1.8 No oral, telegraphic or telephonic submittals will be accepted. IFB's may be submitted in electronic format via Collin County eBid.

1.9 All Invitation For Bids (IFB) submitted electronically via Collin County eBid shall remain locked until official date and time of opening as stated in the Special Terms and Conditions of the IFB.

1.10 Time/date stamp clock in Collin County Purchasing Department shall be the official time of receipt for all Invitation for Bids (IFB) submitted in hard copy paper form. IFB's received in the Collin County Purchasing Department after submission deadline shall be considered void and unacceptable. Absolutely no late submittals will be considered. Collin County accepts no responsibility for technical difficulties related to electronic submittals.

1.11 For hard copy paper form submittals, any alterations made prior to opening date and time must be initialed by the signer of the IFB guaranteeing authenticity. Submittals cannot be altered or amended after submission deadline.

1.12 Collin County is by statute exempt from the State Sales Tax and Federal Excise Tax; therefore, the prices submitted shall not include taxes.

1.13 Any interpretations, corrections and/or changes to an Invitation For Bid, and related Specifications or extensions to the opening/receipt date will be made by addenda to the respective document by the Collin County Purchasing Department. Questions and/or clarification requests must be submitted no later than seven (7) days prior to the opening/receipt date. Those received at a later date may not be addressed prior to the public opening. Sole authority to authorize addenda shall be vested in Collin County Purchasing Agent as entrusted by the Collin County Commissioners' Court. Addenda may be transmitted electronically via Collin County eBid.

1.13.1 Addenda will be transmitted to all that are known to have received a copy of the IFB/RFQ/RFP/RFI/CSP and related Specifications. However, it shall be the sole responsibility of the Bidder/Quoter/Offeror to verify issuance/non-issuance of addenda and to check all avenues of document availability (i.e. **Collin County eBid** <https://collincountvtx.ionwave.net/>, telephoning Purchasing Department directly, etc.) prior to opening/receipt date and time to insure Bidder/Quoter/Offeror's receipt of any addenda issued. Bidder/Quoter/Offeror shall acknowledge receipt of all addenda.

1.14 All materials and services shall be subject to Collin County approval.

1.15 Collin County reserves the right to make award in whole or in part as it deems to be in the best interest of the County.

1.16 Any reference to model/make and/or manufacturer used in specifications is for descriptive purposes only. Products/materials of like quality will be considered.

1.17 Bidders taking exception to the specifications shall do so at their own risk. By offering substitutions, Bidder shall state these exceptions in the section provided in the IFB or by attachment. Exception/substitution, if accepted, must meet or exceed specifications stated therein. Collin County reserves the right to accept or reject any and/or all of the exception(s)/substitution(s) deemed to be in the best interest of the County.

1.19 Minimum Standards for Responsible Prospective Bidders: A prospective Bidder must meet the following minimum requirements:

1.19.1 have adequate financial resources, or the ability to obtain such resources as required;

1.19.2 be able to comply with the required or proposed delivery/completion schedule;

1.19.3 have a satisfactory record of performance;

1.19.4 have a satisfactory record of integrity and ethics;

1.19.5 be otherwise qualified and eligible to receive an award.

Collin County may request documentation and other information sufficient to determine Bidder's ability to meet these minimum standards listed above.

1.20 Vendor shall bear any/all costs associated with it's preparation of an IFB.

1.21 Public Information Act: Collin County is governed by the Texas Public Information Act, Chapter 552 of the Texas Government Code. All information submitted by prospective bidders during the bidding process is subject to release under the Act.

1.22 The Bidder shall comply with Commissioners' Court Order No. 2004-167-03-11, County Logo Policy.

1.23 Interlocal Agreement: Successful bidder agrees to extend prices and terms to all entities that has entered into or will enter into joint purchasing interlocal cooperation agreements with Collin County.

1.24 Bid Openings: All bids submitted will be read at the county's regularly scheduled bid opening for the designated project. However, the reading of a bid at bid opening should be not construed as a comment on the responsiveness of such bid or as any indication that the county accepts such bid as responsive.

The county will make a determination as to the responsiveness of bids submitted based upon compliance with all applicable laws, Collin County Purchasing Guidelines, and project documents, including but not limited to the project specifications and contract documents. The county will notify the successful bidder upon award of the contract and, according to state law; all bids received will be available for inspection at that time.

2.0 TERMS OF CONTRACT

2.1 A bid, when properly accepted by Collin County, shall constitute a contract equally binding between the Vendor/Contractor/Provider and Collin County. No different or additional terms will become part of this contract with the exception of a Change Order.

2.2 No oral statement of any person shall modify or otherwise change, or affect the terms, conditions or specifications stated in the resulting contract. All Amendments and/or Change Orders to the contract will be made in writing by Collin County Purchasing Agent.

2.3 No public official shall have interest in the contract, in accordance with Vernon's Texas Codes Annotated, Local Government Code Title 5, Subtitle C, Chapter 171.

2.4 The Vendor/Contractor/Provider shall comply with Commissioners' Court Order No. 96-680-10-28, Establishment of Guidelines & Restrictions Regarding the Acceptance of Gifts by County Officials & County Employees.

2.5 Design, strength, quality of materials and workmanship must conform to the highest standards of manufacturing and engineering practice.

2.6 Bids must comply with all federal, state, county and local laws concerning the type(s) of product(s)/service(s)/equipment/project(s) contracted for, and the fulfillment of all ADA (Americans with Disabilities Act) requirements.

2.7 All products must be new and unused, unless otherwise specified, in first-class condition and of current manufacture. Obsolete products, including products or any parts not compatible with existing hardware/software configurations will not be accepted.

2.8 Vendor/Contractor/Provider shall provide any and all notices as may be required under the Drug-Free Work Place Act of 1988, 28 CFR Part 67, Subpart F, to its employees and all sub-contractors to insure that Collin County maintains a drug-free work place.

2.9 Vendor/Contractor/Provider shall defend, indemnify and save harmless Collin County and all its officers, agents and employees and all entities, their officers, agents and employees who are participating in this contract from all suits, claims, actions, damages (including personal injury and or property damages), or demands of any character, name and description, (including attorneys' fees, expenses and other defense costs of any nature) brought for or on account of any injuries or damages received or sustained by any person, persons, or property on account of Vendor/Contractor/Provider's breach of the contract arising from an award, and/or any negligent act, error, omission or fault of the Vendor/Contractor/Provider, or of any agent, employee, subcontractor or supplier of Vendor/Contractor/Provider in the execution of, or performance under, any contract which may result from an award. Vendor/Contractor/Provider shall pay in full any judgment with costs, including attorneys' fees and expenses which are rendered against Collin County and/or participating entities arising out of such breach, act, error, omission and/or fault.

2.10 Expenses for Enforcement. In the event either Party hereto is required to employ an attorney to enforce the provisions of this Agreement or is required to commence legal proceedings to enforce the provisions hereof, the prevailing Party shall be entitled to recover from the other, reasonable attorney's fees and court costs incurred in connection with such enforcement, including collection.

2.11 If a contract, resulting from a Collin County IFB is for the execution of a public work, the following shall apply:

2.11.1 In accordance with V.T.C.A. 2253.021, a governmental agency that makes a public work contract with a prime contractor shall require the contractor, before beginning work, to execute to the governmental entity a Payment Bond if the contract is in excess of \$25,000.00. Such bond

shall be in the amount of the contract payable to the governmental entity and must be executed by a corporate surety in accordance with Section 1, Chapter 87, Acts of the 56th Legislature, Regular Session, 1959 (Article 7.19-1 Vernon's Texas Insurance Code).

2.11.2 In accordance with V.T.C.A. 2253.021, a governmental agency that makes a public work contract with a prime contractor shall require the contractor, before beginning work, to execute to the governmental entity a Performance Bond if the contract is in excess of \$100,000.00. Such bond shall be in the amount of the contract payable to the governmental entity and must be executed by a corporate surety in accordance with Section 1, Chapter 87, Acts of the 56th Legislature, Regular Session, 1959 (Article 7.19-1 Vernon's Texas Insurance Code).

2.12 Purchase Order(s) shall be generated by Collin County to the vendor. Collin County will not be responsible for any orders placed/delivered without a valid purchase order number.

2.13 The contract shall remain in effect until any of the following occurs: delivery of product(s) and/or completion and acceptance by Collin County of product(s) and/or service(s), contract expires or is terminated by either party with thirty (30) days written notice prior to cancellation and notice must state therein the reasons for such cancellation. Collin County reserves the right to terminate the contract immediately in the event the Vendor/Contractor/Provider fails to meet delivery or completion schedules, or otherwise perform in accordance with the specifications. Breach of contract or default authorizes the County to purchase elsewhere and charge the full increase in cost and handling to the defaulting Vendor/Contractor/Provider.

2.14 Collin County Purchasing Department shall serve as Contract Administrator or shall supervise agents designated by Collin County.

2.15 All delivery and freight charges (FOB Inside delivery at Collin County designated locations) are to be included as part of the bid price. All components required to render the item complete, installed and operational shall be included in the total bid price. Collin County will pay no additional freight/delivery/installation/setup fees.

2.16 Vendor/Contractor/Provider shall notify the Purchasing Department immediately if delivery/completion schedule cannot be met. If delay is foreseen, the Vendor/Contractor/Provider shall give written notice to the Purchasing Agent. The County has the right to extend delivery/completion time if reason appears valid.

2.17 The title and risk of loss of the product(s) shall not pass to Collin County until Collin County actually receives and takes possession of the product(s) at the point or points of delivery. Collin County shall generate a purchase order(s) to the Vendor/Contractor/Provider and the purchase order number must appear on all itemized invoices.

2.18 Invoices shall be mailed directly to the Collin County Auditor's Office, 2300 Bloomdale Road, Suite 3100, McKinney, Texas 75071. All invoices shall show:

2.18.1 Collin County Purchase Order Number;

2.18.2 Vendor's/Contractor's/Provider's Name, Address and Tax Identification Number;

2.18.3 Detailed breakdown of all charges for the product(s) and/or service(s) including applicable time frames.

2.19 Payment will be made in accordance with V.T.C.A., Government Code, Title 10, Subtitle F, Chapter 2251.

2.20 All warranties shall be stated as required in the Uniform Commercial Code.

2.21 The Vendor/Contractor/Provider and Collin County agree that both parties have all rights, duties, and remedies available as stated in the Uniform Commercial Code.

- 2.22 The Vendor/Contractor/Provider agree to protect Collin County from any claims involving infringements of patents and/or copyrights.
- 2.23 The contract will be governed by the laws of the State of Texas. Should any portion of the contract be in conflict with the laws of the State of Texas, the State laws shall invalidate only that portion. The remaining portion of the contract shall remain in effect. The contract is performable in Collin County, Texas.
- 2.24 The Vendor/Contractor/Provider shall not sell, assign, transfer or convey the contract, in whole or in part, without the prior written approval from Collin County.
- 2.25 The apparent silence of any part of the specification as to any detail or to the apparent omission from it of a detailed description concerning any point, shall be regarded as meaning that only the best commercial practices are to prevail. All interpretations of the specification shall be made on the basis of this statement.
- 2.26 Vendor/Contractor/Provider shall not fraudulently advertise, publish or otherwise make reference to the existence of a contract between Collin County and Vendor/Contractor/Provider for purposes of solicitation. As exception, Vendor/Contractor/Provider may refer to Collin County as an evaluating reference for purposes of establishing a contract with other entities.
- 2.27 The Vendor/Contractor/Provider understands, acknowledges and agrees that if the Vendor/Contractor/Provider subcontracts with a third party for services and/or material, the primary Vendor/Contractor/Provider (awardee) accepts responsibility for full and prompt payment to the third party. Any dispute between the primary Vendor/Contractor/Provider and the third party, including any payment dispute, will be promptly remedied by the primary vendor. Failure to promptly render a remedy or to make prompt payment to the third party (subcontractor) may result in the withholding of funds from the primary Vendor/Contractor/Provider by Collin County for any payments owed to the third party.
- 2.28 Vendor/Contractor/Provider shall provide Collin County with diagnostic access tools at no additional cost to Collin County, for all Electrical and Mechanical systems, components, etc., procured through this contract.
- 2.29 Criminal History Background Check: If required, ALL individuals may be subject to a criminal history background check performed by the Collin County Homeland Security prior to access being granted to Collin County. Upon request, Vendor/Contractor/Provider shall provide list of individuals to Collin County Purchasing Department within five (5) working days.
- 2.30 Non-Disclosure Agreement: Where applicable, vendor shall be required to sign a non-disclosure agreement acknowledging that all information to be furnished is in all respects confidential in nature, other than information which is in the public domain through other means and that any disclosure or use of same by vendor, except as provided in the contract/agreement, may cause serious harm or damage to Collin County. Therefore, Vendor agrees that Vendor will not use the information furnished for any purpose other than that stated in contract/agreement, and agrees that Vendor will not either directly or indirectly by agent, employee, or representative disclose this information, either in whole or in part, to any third party, except on a need to know basis for the purpose of evaluating any possible transaction. This agreement shall be binding upon Collin County and Vendor, and upon the directors, officers, employees and agents of each.
- 2.31 Vendors/Contractors/Providers must be in compliance with the Immigration and Reform Act of 1986 and all employees specific to this solicitation must be legally eligible to work in the United States of America.
- 2.32 Certification of Eligibility: This provision applies if the anticipated Contract exceeds \$100,000.00 and as it relates to the expenditure of federal grant funds. By submitting a bid or proposal in response to this solicitation, the Bidder certifies that at the time of submission, he/she is not on the Federal Government's list of suspended, ineligible, or debarred contractors. In the event of placement on the list between the time of bid/proposal submission and time of award, the Bidder will notify the Collin County Purchasing Agent. Failure to do so may result in terminating this contract for default.

2.33 Notice to Vendors/Contractors/Providers delivering goods or performing services within the Collin County Detention Facility: The Collin County Detention Facility houses persons who have been charged with and/or convicted of serious criminal offenses. When entering the Detention Facility, you could: (1) hear obscene or graphic language; (2) view partially clothed male inmates; (3) be subjected to verbal abuse or taunting; (4) risk physical altercations or physical contact, which could be minimal or possibly serious; (5) be exposed to communicable or infectious diseases; (6) be temporarily detained or prevented from immediately leaving the Detention Facility in the case of an emergency or “lockdown”; and (7) subjected to a search of your person or property. While the Collin County Sheriff’s Office takes every reasonable precaution to protect the safety of visitors to the Detention Facility, because of the inherently dangerous nature of a Detention Facility and the type of the persons incarcerated therein, please be advised of the possibility of such situations exist and you should carefully consider such risks when entering the Detention Facility. By entering the Collin County Detention Facility, you acknowledge that you are aware of such potential risks and willingly and knowingly choose to enter the Collin County Detention Facility.

2.34 Delays and Extensions of Time when applicable:

2.34.1 If the Vendor/Contractor/Provider is delayed at any time in the commence or progress of the Work by an act or neglect of the Owner or Architect/Engineer, or of an employee of either, or of a separate contractor employed by the Owner, or by changes ordered in the Work, or by labor disputes, fire, unusual delay in deliveries, unavoidable casualties or other causes beyond the Vendor/Contractor/Provider's control, or by delay authorized by the Owner pending mediation and arbitration, or by other causes which the Owner or Architect/Engineer determines may justify delay, then the Contract Time shall be extended by Change Order for such reasonable time as the Owner/Architect may determine.

2.34.2 If adverse weather conditions are the basis for a Claim for additional time, such Claim shall be documented by data substantiating that weather conditions were abnormal for the period of time and could not have been reasonably anticipated, and that the weather conditions had an adverse effect on the scheduled construction.

2.35 Disclosure of Certain Relationships: Chapter 176 of the Texas Local Government Code requires that any vendor considering doing business with a local government entity disclose the vendor’s affiliation or business relationship that might cause a conflict of interest with a local government entity. Subchapter 6 of the code requires a vendor to file a conflict of interest questionnaire (CIQ) if a conflict exists. By law this questionnaire must be filed with the records administrator of Collin County no later than the 7th business day after the date the vendor becomes aware of an event that requires the statement to be filed. A vendor commits an offense if the vendor knowingly violates the code. An offense under this section is a misdemeanor. By submitting a response to this request, the vendor represents that it is in compliance with the requirements of Chapter 176 of the Texas Local Government Code. Please send completed forms to the Collin County County Clerk’s Office located at 2300 Bloomdale Rd., Suite 2104, McKinney, TX 75071.

2.36 Disclosure of Interested Parties: Section 2252.908 of the Texas Government Code requires a business entity entering into certain contracts with a governmental entity to file with the governmental entity a disclosure of interested parties at the time the business entity submits the signed contract to the governmental entity. Section 2252.908 requires the disclosure form (Form 1295) to be signed by the authorized agent of the contracting business entity, acknowledging that the disclosure is made under oath and under penalty of perjury. Section 2252.908 applies only to a contract that requires an action or vote by the governing body of the governmental entity before the contract may be signed or has a value of at least \$1 million. Section 2252.908 provides definitions of certain terms occurring in the section. Section 2252.908 applies only to a contract entered into on or after January 1, 2016.

NOTE: All other terms and conditions (i.e. Insurance Requirements, Bond Requirements, etc.) shall be stated in the individual IFB Solicitation documents as Special Terms, Conditions and Specifications.

3.0 INSURANCE REQUIREMENTS

3.1 Before commencing work, the vendor shall be required, at its own expense, to furnish the Collin County Purchasing Agent with certified copies of all insurance certificate(s) indicating the coverage to remain in force throughout the term of this contract.

3.1.1 **Commercial General Liability** insurance including but not limited to the coverage indicated below. Coverage shall not exclude or limit Products/Completed Operations, Contractual Liability, or Cross Liability. Coverage must be written on occurrence form.

- Each Occurrence: \$1,000,000
- Personal Injury & Adv. Injury: \$1,000,000
- Products/Completed Operation Aggregate: \$2,000,000
- General Aggregate: \$2,000,000

3.1.2 **Workers Compensation** insurance as required by the laws of Texas, and Employers' Liability.

Employers' Liability

- Liability, Each Accident: \$500,000
- Disease-Each Employee: \$500,000
- Disease – Policy Limit: \$500,000

3.1.3 **Commercial Automobile Liability** insurance which includes any automobile (owned, non-owned, and hired vehicles) used in connection with the contract.

- Combined Single Limit – Each Accident: \$1,000,000

3.2 With reference to the foregoing insurance requirement, the vendor shall endorse applicable insurance policies as follows:

3.2.1 A waiver of subrogation in favor of Collin County, its officials, employees, volunteers and officers shall be provided for General Liability, Commercial Automobile Liability, and Workers' Compensation.

3.2.2 The vendor's insurance coverage shall name Collin County as additional insured under the General Liability policy.

3.2.3 All insurance policies shall be endorsed to require the insurer to immediately notify Collin County of any decrease in the insurance coverage limits.

3.2.4 All insurance policies shall be endorsed to the effect that Collin County will receive at least thirty (30) days notice prior to cancellation, non-renewal or termination of the policy.

3.2.5 All copies of Certificates of Insurance shall reference the project/contract number.

3.3 All insurance shall be purchased from an insurance company that meets the following requirements:

3.3.1 A financial rating of A-VII or higher as assigned by the BEST Rating Company or equivalent.

3.4 Certificates of Insurance shall be prepared and executed by the insurance company or its authorized agent, and shall contain provisions representing and warranting the following:

3.4.1 Sets forth all endorsements and insurance coverages according to requirements and instructions contained herein.

3.4.2 Sets forth the notice of cancellation or termination to Collin County.

4.0 SPECIAL CONDITIONS AND SPECIFICATIONS

- 4.1 Authorization: By order of the Commissioners' Court of Collin County, Texas sealed bids will be received for specialized printing for Tax Assessor Collector.
- 4.2 Purpose: The intended use/purpose for this Invitation for Bid is for various printing jobs required by the Tax Assessor Collector Departments.
- 4.3 Term: Successful vendor(s) will be awarded a contract effective from date of award through August 31, 2017. At Collin County's option and approval by the vendor, the contract may be renewed for four (4) additional one (1) year periods.
- 4.4 Funding: Funds for payment have been provided through the Collin County budget approved by the Commissioners' Court for this fiscal year only. State of Texas statutes prohibit the County from any obligation of public funds beyond the fiscal year for which a budget has been approved. Therefore, anticipated orders or other obligations that may arise past the end of the current Collin County fiscal year shall be subject to budget approval.
- 4.5 Price Reduction: If during the life of the contract, the vendor's net prices to its customers for the same product(s) and/or services shall be reduced below the contracted price, it is understood and agreed that the County shall receive such price reduction.
- 4.6 Price Re-determination: A price re-determination may be considered by Collin County only at the anniversary date of the contract. For purpose of this contract the anniversary date will be August 31st of each year. All requests for price re-determination shall be in written form, shall be submitted a minimum of sixty (60) days prior to anniversary date and shall include documents supporting price re-determination such as Manufacturer's direct cost, postage rates, Railroad Commission rates, Federal/State minimum wage law, Federal/State unemployment taxes, F.I.C.A, Insurance Coverage Rates, etc. The bidder's past experience of honoring contracts at the bid price will be an important consideration in the evaluation of the lowest and best bid. Collin County reserves the right to accept or reject any/all of the price re-determination as it deems to be in the best interest of the County.
- 4.7 Delivery/Completion/Response Time: Vendor shall place product(s) and/or complete services at the County's designated location(s) and time(s) as stated herein.
- 4.8 Testing: Testing may be performed at the request of Collin County, by an agent so designated by the County, without expense to Collin County.
- 4.9 Samples/Demos: When requested, samples/demos shall be furnished to the County at no expense.
- 4.10 Approximate Usage: Estimated annual quantities are given for each commodity. Approximate usage does not constitute an order, but only implies the probable quantity the County will use. Commodities will be ordered on an as-needed basis.
- 4.11 **Sample Review: This bid includes various items and forms, Attachments A-L. Bidder shall assume sole responsibility for viewing these samples in order to submit a bid consistent with the requirements of the County. Failure to do so may result in rejection of bid. When a discrepancy occurs between specifications or the on-line PDF sample, the hard copy samples shall prevail. Samples will be made available to prospective bidders for viewing during the hours of 9:00am - 4:00pm Monday through Friday (excluding County Holidays) in the Purchasing Department, Jack Hatchell Administration Building,**

2300 Bloomdale Road, Suite 3160 McKinney, TX 75071. PDF copies attached, Refer to Attachments A-L.

- 4.12 Statement pricing shall include costs for all materials, labor, typesetting, set up, forms, test samples, proofs, overprinting of data information and all other **costs** associated with the job (see 4.17.1 for expanded information).
- 4.13 Artwork: All artwork, layouts, plate negatives, proofs and all CD's (data and image) shall become the property of Collin County.
- 4.14 Postal Regulations: Vendor shall adhere to all current postal regulations as they become in effect during the term of this contract.
- 4.15 Specifications: Listed below are minimum requirements and are intended to govern the general printing services, including all material necessary for a finished product, which Collin County uses during the course of routine County business.
- 4.16 **TYPES OF MAILINGS:** All line-item pricing shall include the printing of: statements (front & back), carrier envelopes, reply envelopes and letter inserts (front & back). It shall also include: data processing, image capturing on CD and microfiche, inserting letters, and delivery to U.S. Postal Service for one mailing.
 - 4.16.1 Line item #1 - Original October Mailing: Cost per statement must include 8 1/2" x 11" one page perforated printed front and back form, black ink on 24 lb. color paper or color printing on 24 lb. white paper (ink/paper color to be determined). There will be two envelopes - one for sending statements (#10 window envelopes, Refer to Attachment K-L for example) with printing on both sides and one for returning (#9 non-standard envelope, Refer to Attachment J for example). One insert shall be included with the statement. The insert shall be 8.5" x 11" printed on both sides on white paper in black or multicolored ink with information provided by the County. Vendor must convert a flat file, reformatting the file for a production file. All costs of programming must be included in the per statement price quoted. The statement number must also be converted to bar code and Optical Character Recognition (OCR) on the bottom portion of the statement. For proofing purposes Collin County requires the first 500 statements of residents whose last name start with the letters "M" and "B". Refer to Attachments A- E for line item 1 October statements.
 - 4.16.1.1 There are three different types of statements for the original mailing:
 - 4.16.1.1.1 Original owner statement - approximately 203,437.
 - 4.16.1.1.2 Mortgage Company statement - approximately 11,497.
 - 4.16.1.1.3 Notification statement to owner - approximately 148,930. Mortgage Company receives either a mortgage company statement or taped version at their request.
 - 4.16.2 Line Item #2 - February Delinquent Mailing: one page on 20 lb. blue paper with black ink. There will be one insert letter and two envelopes - one for sending statements (#10 window envelopes, sample attached) with printing on both sides and one for returning (#9 non-standard envelope, sample attached). Vendor must convert a flat file, reformatting the file for a production file. All costs of programming must be included in

the per statement price quoted. The statement number must be converted to bar code and Optical Character Recognition (OCR) on the bottom portion of the statement. There will be approximately 34,000 late notices. Refer to Attachment F for line item 2 February statement.

4.16.3 Line Item #3 – May Delinquent Mailing: one page on 20 lb. pink paper with black ink. There will be one insert letter and two envelopes - one for sending statements (#10 window envelopes, sample attached) with printing on both sides and one for returning (#9 non-standard envelope, sample attached). Vendor must convert a flat file, reformatting the file for a production file. All costs of programming must be included in the per statement price quoted. The statement number must be converted to bar code and Optical Character Recognition (OCR) on the bottom portion of the statement. There will be approximately 18,000 late notices. Refer to Attachment G-H for line item 3 May statements.

4.16.4 Line Item #4 – July Attorney Letter: one page on 20 lb. mint green paper with black ink. Letters will be printed and sent to County attorneys on an as needed basis (to be determined at a later date). No postage, envelopes or mailing of the letters are necessary for this line-item. The statement number must be converted to bar code and Optical Character Recognition (OCR) on the bottom portions of the statement. All letters are to be submitted to the County attorneys. There will be approximately 13,500 notices. Refer to Attachment I for line item 4 July statement, July statements shall be in mint green.

4.17 Tax Assessor/Collector must approve final statement(s) test before production is begun. Specific accounts maybe requested for evaluation. Collin County requires the first 500 statements of residents whose last names start with the letters “M” and “B” for this evaluation.

4.18 All work shall be completed in a secure location.

4.19 Vendor must have redundant capability (able to complete project, on time, in case of local emergency).

4.20 The information on the data file is not to be released or used for any purpose other than preparation and mailing of the Collin County Tax Statements for the current tax year.

4.21 All pieces are to be mailed with the address from the supplied data file. All statements missing the city, state and/or Zip Code as well as any statements with foreign addresses are to be delivered to the Collin County Tax Office in bulk.

4.22 Vendor must be able to read and prepare flat file in ascii format for printing within (2) calendar days for October mailing and within (1) calendar day for February and May mailing of obtaining a correct file.

4.23 The attached sample tax statements are incorporated into this specification for the vendor’s convenience. Hard copies are available to view at Collin County’s Purchasing Office located at, 2300 Bloomdale Road, Suite 3160 McKinney, TX 75071 from 9:00 am to 4:00 pm Monday through Friday (excluding County Holidays). **When a discrepancy occurs between the**

specifications or the on-line PDF sample, the hard copy samples available for viewing at Collin County Purchasing shall prevail.

- 4.24 October statements are to be mailed completely within 7 days from delivery of file. February, May & July statements mailing date will be 2 days from delivery of file.
- 4.25 Bidder shall pre-sort statements by ZIP Code and address. When the address does not have the +4 ZIP Code information, (additional 4-digit add-on code) at the end of the original 5 digit ZIP Code, zeros are not to be added in place of the +4 code, it is to be left blank, use only the original 5-digit ZIP Code.
- 4.26 When multiple statements are mailed to the same name and address, they are to be mailed in a single parcel.
- 4.27 There's to be a verification process to determine how many statements have been printed, processed, and mailed.
- 4.28 Collin County will pay actual postage costs.
 - 4.28.1 October Mailing- Collin County will provide vendor a check for one hundred percent (100%) of the estimated postage prior to the October mailing. Vendor will reimburse Collin County for any outstanding balance. Vendor shall invoice Collin County for any additional postage, not included in the original estimate.
 - 4.28.2 February, May and July mailings will be reimbursed actual postage.
- 4.29 Microfiche is to be provided to Collin County by December 15th of each year.
- 4.30 No overruns allowed.
- 4.31 The tax roll is to be provided on microfiche.
- 4.32 October and delinquent tax statements are to be provided on CD within two weeks of mailing statements.

Attachment A-
Line Item 1
Property Tax Notification
Statement

2015
PROPERTY TAX
NOTIFICATION/STATEMENT

KENNETH L. MAUN
TAX ASSESSOR COLLECTOR
COLLIN COUNTY

OFFICE LOCATIONS

2300 BLOOMDALE RD. STE. 2324
MCKINNEY, TX 75071
920 E. PARK BLVD. STE. 100
PLANO, TX 75074
6101 FRISCO SQUARE BLVD. STE. 2000
FRISCO, TX 75034

ACCOUNT NUMBER

[REDACTED]

P.O. BOX 8046
MCKINNEY, TEXAS 75070-8046
972-547-5020
METRO 972-424-1460 EXT. 5020

YOUR ORIGINAL TAX STATEMENT HAS BEEN REQUESTED BY, AND MAILED TO, THE PARTY LISTED AT THE BOTTOM OF THIS STATEMENT. IF YOU DO NOT HAVE AN ESCROW ACCOUNT WITH YOUR MORTGAGE COMPANY AND ARE RESPONSIBLE FOR PAYING YOUR OWN TAXES, YOU MAY USE THIS NOTIFICATION AS A STATEMENT.

TO CORRECT AN ERROR IN OWNERSHIP, EXEMPTIONS OR JURISDICTIONS, YOU MUST CONTACT THE CENTRAL APPRAISAL DISTRICT

OWNER NAME AND ADDRESS

PROPERTY DESCRIPTION



[REDACTED]

[REDACTED]

2-1

SITUS: [REDACTED]

OWNER ID: [REDACTED]

EXEMPTIONS:

Property Class	Land Value	Agricultural Exclusion	Improvement Value	Personal Property	Appraised Value (Market)	Homestead Cap	Assessed Value
Qualifying	90,900	0	337,276	0	428,176	0	428,176
Non Qualifying	0	0	0	0	0	0	0
Agricultural	0	0	0	0	0	0	0
Total	90,900	0	337,276	0	428,176	0	428,176

TAXING ENTITY	ASSESSED VALUE	EXEMPTION AMOUNT	TAXABLE VALUE	TAX RATE	CEILING		TAXES BY ENTITY
					YEAR	AMOUNT	
COLLIN COUNTY	428,176	0	428,176	0.225000			963.40
LUCAS CITY	428,176	0	428,176	0.320661			1,372.99
COLLIN COLLEGE	428,176	0	428,176	0.081960			350.93
MCKINNEY ISD	428,176	0	428,176	1.670000			7,150.54
*ADDITIONAL CITY SALES TAX REDUCED YOUR CITY AD VALOREM TAX BY \$ 80.47.							

Visit www.certifiedpayments.net to pay by electronic check or credit card
Bureau code # 5475020



Convenience fee charged.
or call Certified Payments at 1-877-264-7533
credit card only - no electronic checks by phone

Only persons already receiving an over 65, disabled veteran or disabled person exemption may pay current taxes on their resident homestead in four installments without penalty or interest if their first payment is made by **January 31st**. Remaining three installments due dates are **March 31st**, **May 31st**, and **July 31st**.

1st INSTALLMENT

[REDACTED]

TOTAL TAXES DUE NOW

\$9,837.86

DELINQUENT 2/1/2016

YOUR CHECK WILL BE CONVERTED INTO AN ELECTRONIC FUND TRANSFER.

DETACH HERE AND RETURN BOTTOM PORTION WITH YOUR PAYMENT.

THE PARTY LISTED BELOW HAS REQUESTED YOUR PROPERTY TAX STATEMENT

IF YOU ARE RESPONSIBLE FOR PAYING YOUR OWN TAXES, PLEASE USE THIS NOTIFICATION AS A STATEMENT.

TAXES WILL BE DELINQUENT FEB. 1, 2016. UNPAID TAXES WILL INCUR THE FOLLOWING PENALTY & INTEREST, IF PAID IN:

FEBRUARY +7%	10,526.51
MARCH +9%	10,723.28

PARTIAL PAYMENTS ARE ACCEPTED BUT ANY UNPAID TAXES WILL INCUR PENALTIES & INTEREST ON FEB.1ST

ACCOUNT NUMBER

[REDACTED]

TOTAL TAXES DUE NOW

\$9,837.86

DELINQUENT 2/1/2016

STATEMENT REQUESTED BY:

REFERENCE NUMBER

[REDACTED]

[REDACTED]

[REDACTED]

IF YOU ARE 65 YEARS OF AGE OR OLDER OR ARE DISABLED AND YOU OCCUPY THE PROPERTY DESCRIBED IN THIS DOCUMENT AS YOUR RESIDENCE HOMESTEAD, YOU SHOULD CONTACT THE APPRAISAL DISTRICT REGARDING ANY ENTITLEMENT YOU MAY HAVE TO A POSTPONEMENT IN THE PAYMENT OF THESE TAXES.

DO NOT PAY THIS STATEMENT IF THE PARTY NAMED ABOVE IS YOUR MORTGAGE COMPANY THEY WILL BE PAYING YOUR TAXES IF YOU HAVE AN ESCROW ACCOUNT WITH THEM

PLEASE MAKE ADDRESS CORRECTIONS HERE.

[REDACTED]



INFORMATION ON TAXES

Assessment Ratio 100%

Property taxes are the primary sources of local government revenue in Texas. Your Tax Assessor Collector in Collin County will be collecting Ad Valorem, or property taxes, for the following entities: Collin County, Collin County Community College District, the Cities of Allen, Anna, Blue Ridge, Celina, Fairview, Farmersville, Frisco, Josephine, Lavon, Lowry Crossing, Lucas, McKinney, Melissa, Murphy, Nevada, New Hope, Parker, Plano, Princeton, Prosper, Richardson, Sachse, St. Paul, Weston, and Wylie, Seis Lagos Utility District, the Allen, Anna, Blue Ridge, Celina, Community, Farmersville, Frisco, Lovejoy, McKinney, Melissa, Plano, Princeton, Prosper and Wylie Independent School Districts, and possibly others.

YOUR CAREFUL REVIEW OF TAXPAYER INFORMATION CONTAINED IN THIS STATEMENT COULD HELP TO ELIMINATE MANY TAX PROBLEMS IN THE FUTURE.

You have from October to January 31 of the next year to pay your taxes without penalty or interest. You will be charged penalty and interest on February 1.

ANY ERRORS OR DISCREPANCIES IN LEGAL DESCRIPTION, NAME, ADDRESS OR QUESTIONS CONCERNING VALUE SHOULD BE REFERRED TO THE CENTRAL APPRAISAL DISTRICT.

If your taxes should be paid by a mortgage company, your copy of the statement should indicate "Property Tax Notification". If your statement is an original copy, please forward this statement to your mortgage company with your loan number.

If you bought other property and did not receive a tax statement, or sold this property and should not have received the statement, please contact this office immediately. If you own multiple properties and have not received all your statements... NOW is the time to INQUIRE about your OTHER STATEMENTS.

Penalty and interest are imposed at the statutory rate of 12% penalty and 12% per year interest on unpaid taxes WHETHER OR NOT THE TAXPAYER RECEIVED THE TAX BILL. By July 1st, a delinquent taxpayer will have incurred 18% penalty and interest and up to 20% for attorney fees and runs a risk of being sued or having his/her property seized after that time.

THE TAX COLLECTOR DOES NOT HAVE ANY LEGAL AUTHORITY TO FORGIVE ANY PENALTY OR INTEREST CHARGE ON AN UNPAID TAX, NO MATTER HOW GOOD YOUR REASON IS FOR NOT PAYING.

On real property (land and buildings), the current owner can be held liable for any unpaid taxes on the land, even for years before he/she bought the property. The new owner is liable for the entire year's tax to the Tax Collector, even if that person bought the property during the year and had their tax prorated with the seller at the time of closing.

On personal property (business inventory, mobile homes, equipment, airplanes, etc) the person who owned the property on January 1 of the tax year is personally liable for the entire year's tax, even if he/she sold the property during the year.

THE CENTRAL APPRAISAL DISTRICT is a **SEPARATE** local agency and is not part of County government or the Collin County Tax Office. The CAD decides what property is to be taxed, its appraised value, whether to grant exemptions, who the taxable owner is, his/her address, and what taxing jurisdictions tax the property.

HOMESTEAD CAP VALUE: In November 1997, Texas voters approved a constitutional amendment to limit increases in the appraised value of residence homestead to 10 percent annually. The new law, Property Tax Code Section 23.23, provides that the appraised value of a residence homestead beginning in the 1998 tax year may not exceed the lesser of: (1) the market value of the property; or (2) the sum of: (A) 10 percent of the appraised value of the property for the last year in which the property was appraised for taxation times the number of years since the property was last appraised; (B) the appraised value of the property for the last year in which the property was appraised; and (C) the market value of all new improvements to the property.

OVER AGE 65/DISABILITY INSTALLMENT PAYMENT OF HOMESTEAD TAXES OPTION

To take advantage of this option a qualified individual who occupies a residence homestead must pay at least one fourth of his taxes by Jan. 31. The remaining taxes must be paid in three equal installments due by March 31st, May 31st, and July 31st. If the individual fails to make a payment before the installment date listed above, the unpaid amount is delinquent and incurs a penalty of 6 percent and interest as provided in Section 31.031 S.P.T.C

If you have a mortgage company you will need to make them aware of your intent to participate in the OA65/Disabled person installment payment option.

EXEMPTIONS:

CAREFULLY REVIEW YOUR EXEMPTIONS ON FACE OF STATEMENT. IF THE EXEMPTIONS SHOWN ARE NOT ACCURATE, OR IF YOU HAVE ANY QUESTIONS ABOUT YOUR EXEMPTIONS, **CALL THE CENTRAL APPRAISAL DISTRICT IMMEDIATELY.** MARKET VALUE WILL BE REDUCED BY EXEMPTIONS WHERE APPROPRIATE AND APPROVED TO OBTAIN TAXABLE VALUE.

POSSIBLE EXEMPTIONS (AS THEY MAY APPEAR ON STATEMENT):

1. **HS001 - HOMESTEAD.** THIS EXEMPTION IS STATE MANDATED FOR SCHOOL DISTRICTS ONLY AND **MAY** BE AUTHORIZED BY ANY TAXING ENTITY. NOTE: THE COLLIN COUNTY COMMUNITY COLLEGE DISTRICT DOES NOT OFFER THIS EXEMPTION AT THIS TIME.
2. **OV003 - OVER AGE 65.** THIS EXEMPTION IS STATE MANDATED FOR SCHOOL DISTRICTS ONLY AND **MAY** BE AUTHORIZED BY ANY TAXING ENTITY.
3. **DP005 - DISABLED.** THIS EXEMPTION WILL BE RECOGNIZED AS AUTHORIZED BY ANY TAXING ENTITY.
4. **DV001-DV004 - VETERAN.** THIS IS A STATE MANDATED EXEMPTION. THE EXEMPTION ALLOWED IS BASED UPON THE PERCENTAGE OF DISABILITY CERTIFIED BY THE VETERANS ADMINISTRATION, TO A MAXIMUM OF \$12,000.

WHEN YOU PROVIDE A CHECK AS PAYMENT, YOU AUTHORIZE US EITHER TO USE INFORMATION FROM YOUR CHECK TO MAKE A ONE-TIME ELECTRONIC FUND TRANSFER FROM YOUR ACCOUNT OR TO PROCESS THE PAYMENT AS A CHECK TRANSACTION. WHEN WE USE INFORMATION FROM YOUR CHECK TO MAKE AN ELECTRONIC FUND TRANSFER, FUNDS MAY BE WITHDRAWN FROM YOUR ACCOUNT AS SOON AS THE SAME DAY WE RECEIVE YOUR PAYMENTS, AND YOU WILL NOT RECEIVE YOUR CHECK BACK FROM YOUR FINANCIAL INSTITUTION.

BE SURE TO ENCLOSE THE STUB PORTION OF YOUR TAX STATEMENT WHEN YOU PAY BY MAIL. SEND CHECK OR MONEY ORDER. CREDIT CARDS MAY BE PROCESSED THROUGH CERTIFIED PAYMENTS, INC. THERE WILL BE A NOMINAL FEE FOR THIS SERVICE. SEE FRONT OF THIS STATEMENT. DO NOT SEND CASH THROUGH THE MAIL. IF YOU WISH TO PAY IN PERSON, YOU MAY PAY AT THE TAX OFFICE (ADDRESSES LISTED ON FRONT PAGE). BE SURE TO WRITE YOUR ACCOUNT NUMBER ON YOUR CHECK TO INSURE PROPER CREDIT.

Attachment B-
Line Item 1
Property Tax Statement
(Homeowner)
Page 1-front and back

**2015
PROPERTY TAX STATEMENT**

**KENNETH L. MAUN
TAX ASSESSOR COLLECTOR
COLLIN COUNTY**

OFFICE LOCATIONS

2300 BLOOMDALE RD. STE. 2324
MCKINNEY, TX 75071
920 E. PARK BLVD. STE. 100
PLANO, TX 75074
6101 FRISCO SQUARE BLVD. STE. 2000
FRISCO, TX 75034

ACCOUNT NUMBER

[REDACTED]

P.O. BOX 8046
MCKINNEY, TEXAS 75070-8046
972-547-5020
METRO 972-424-1460 EXT. 5020

TO CORRECT AN ERROR IN OWNERSHIP, EXEMPTIONS OR JURISDICTIONS,
YOU MUST CONTACT THE CENTRAL APPRAISAL DISTRICT

IF YOU ARE 65 YEARS OF AGE OR OLDER OR ARE DISABLED AND YOU OCCUPY THE PROPERTY DESCRIBED IN THIS DOCUMENT AS YOUR RESIDENCE HOMESTEAD, YOU SHOULD CONTACT THE APPRAISAL DISTRICT REGARDING ANY ENTITLEMENT YOU MAY HAVE TO A POSTPONEMENT IN THE PAYMENT OF THESE TAXES.

OWNER NAME AND ADDRESS	PROPERTY DESCRIPTION
 [REDACTED]	[REDACTED]
SITUS: [REDACTED]	
OWNER ID: [REDACTED]	
EXEMPTIONS:	

Property Class	Land Value	Agricultural Exclusion	Improvement Value	Personal Property	Appraised Value (Market)	Homestead Cap	Assessed Value
Qualifying	0	0	0	0	2,100	0	2,100
Non Qualifying	0	0	0	0	0	0	0
Agricultural	0	0	0	0	0	0	0
Total	0	0	0	2,100	2,100	0	2,100

TAXING ENTITY	ASSESSED VALUE	EXEMPTION AMOUNT	TAXABLE VALUE	TAX RATE	CEILING		TAXES BY ENTITY
					YEAR	AMOUNT	
COLLIN COUNTY	2,100	0	2,100	0.225000			4.72
PLANO CITY	2,100	0	2,100	0.488600			10.26
COLLIN COLLEGE	2,100	0	2,100	0.081960			1.72
PLANO ISD	2,100	0	2,100	1.439000			30.22
							RENDITION PENALTY 4.69

Visit www.certifiedpayments.net to pay by electronic check or credit card
Bureau code # 5475020



Convenience fee charged.
or call Certified Payments at 1-877-264-7533
credit card only - no electronic checks by phone

TAXES WILL BE DELINQUENT FEB. 1, 2016. UNPAID TAXES WILL INCUR THE FOLLOWING PENALTY & INTEREST, IF PAID IN:

FEBRUARY +7%	55.21
MARCH +9%	56.25

PARTIAL PAYMENTS ARE ACCEPTED BUT ANY UNPAID TAXES WILL INCUR PENALTIES & INTEREST ON FEB.1ST

QTR INSTALLMENT
(if eligible - see reverse)

TOTAL TAXES DUE NOW

\$51.61

TAXES BECOME DELINQUENT 2/1/2016

YOUR CHECK WILL BE CONVERTED INTO AN ELECTRONIC FUND TRANSFER. DETACH HERE AND RETURN BOTTOM PORTION WITH YOUR PAYMENT.

Do not fold, paper clip or staple check to bill

MAKE CHECK PAYABLE TO:
KENNETH L. MAUN
TAX ASSESSOR COLLECTOR
COLLIN COUNTY
P.O. BOX 8046
MCKINNEY, TX 75070-8046

Only persons already receiving an over 65, disabled person or disabled veteran exemption may pay current taxes on their resident homestead in four installments without penalty or interest if their first payment is made by **January 31st**. Remaining three installment due dates **March 31st, May 31st and July 31st**

1st INSTALLMENT

Please check if you are making a quarter payment

ACCOUNT NUMBER

[REDACTED]

TOTAL TAXES DUE NOW

\$51.61

TAXES BECOME DELINQUENT 2/1/2016

PLEASE MAKE ADDRESS CORRECTIONS HERE

[REDACTED]



INFORMATION ON TAXES

Assessment Ratio 100%

Property taxes are the primary sources of local government revenue in Texas. Your Tax Assessor Collector in Collin County will be collecting Ad Valorem, or property taxes, for the following entities: Collin County, Collin County Community College District, the Cities of Allen, Anna, Blue Ridge, Celina, Fairview, Farmersville, Frisco, Josephine, Lavon, Lowry Crossing, Lucas, McKinney, Melissa, Murphy, Nevada, New Hope, Parker, Plano, Princeton, Prosper, Richardson, Sachse, St. Paul, Weston, and Wylie, Seis Lagos Utility District, the Allen, Anna, Blue Ridge, Celina, Community, Farmersville, Frisco, Lovejoy, McKinney, Melissa, Plano, Princeton, Prosper and Wylie Independent School Districts, and possibly others.

YOUR CAREFUL REVIEW OF TAXPAYER INFORMATION CONTAINED IN THIS STATEMENT COULD HELP TO ELIMINATE MANY TAX PROBLEMS IN THE FUTURE.

You have from October to January 31 of the next year to pay your taxes without penalty or interest. You will be charged penalty and interest on February 1.

ANY ERRORS OR DISCREPANCIES IN LEGAL DESCRIPTION, NAME, ADDRESS OR QUESTIONS CONCERNING VALUE SHOULD BE REFERRED TO THE CENTRAL APPRAISAL DISTRICT.

If your taxes should be paid by a mortgage company, your copy of the statement should indicate "Property Tax Notification". If your statement is an original copy, please forward this statement to your mortgage company with your loan number.

If you bought other property and did not receive a tax statement, or sold this property and should not have received the statement, please contact this office immediately. If you own multiple properties and have not received all your statements... NOW is the time to INQUIRE about your OTHER STATEMENTS.

Penalty and interest are imposed at the statutory rate of 12% penalty and 12% per year interest on unpaid taxes WHETHER OR NOT THE TAXPAYER RECEIVED THE TAX BILL. By July 1st, a delinquent taxpayer will have incurred 18% penalty and interest and up to 20% for attorney fees and runs a risk of being sued or having his/her property seized after that time.

THE TAX COLLECTOR DOES NOT HAVE ANY LEGAL AUTHORITY TO FORGIVE ANY PENALTY OR INTEREST CHARGE ON AN UNPAID TAX, NO MATTER HOW GOOD YOUR REASON IS FOR NOT PAYING.

On real property (land and buildings), the current owner can be held liable for any unpaid taxes on the land, even for years before he/she bought the property. The new owner is liable for the entire year's tax to the Tax Collector, even if that person bought the property during the year and had their tax prorated with the seller at the time of closing.

On personal property (business inventory, mobile homes, equipment, airplanes, etc) the person who owned the property on January 1 of the tax year is personally liable for the entire year's tax, even if he/she sold the property during the year.

THE CENTRAL APPRAISAL DISTRICT is a **SEPARATE** local agency and is not part of County government or the Collin County Tax Office. The CAD decides what property is to be taxed, its appraised value, whether to grant exemptions, who the taxable owner is, his/her address, and what taxing jurisdictions tax the property.

HOMESTEAD CAP VALUE: In November 1997, Texas voters approved a constitutional amendment to limit increases in the appraised value of residence homestead to 10 percent annually. The new law, Property Tax Code Section 23.23, provides that the appraised value of a residence homestead beginning in the 1998 tax year may not exceed the lesser of: (1) the market value of the property; or (2) the sum of: (A) 10 percent of the appraised value of the property for the last year in which the property was appraised for taxation times the number of years since the property was last appraised; (B) the appraised value of the property for the last year in which the property was appraised; and (C) the market value of all new improvements to the property.

OVER AGE 65/DISABILITY INSTALLMENT PAYMENT OF HOMESTEAD TAXES OPTION

To take advantage of this option a qualified individual who occupies a residence homestead must pay at least one fourth of his taxes by Jan. 31. The remaining taxes must be paid in three equal installments due by March 31st, May 31st, and July 31st. If the individual fails to make a payment before the installment date listed above, the unpaid amount is delinquent and incurs a penalty of 6 percent and interest as provided in Section 31.031 S.P.T.C

If you have a mortgage company you will need to make them aware of your intent to participate in the OA65/Disabled person installment payment option.

EXEMPTIONS:

CAREFULLY REVIEW YOUR EXEMPTIONS ON FACE OF STATEMENT. IF THE EXEMPTIONS SHOWN ARE NOT ACCURATE, OR IF YOU HAVE ANY QUESTIONS ABOUT YOUR EXEMPTIONS, **CALL THE CENTRAL APPRAISAL DISTRICT IMMEDIATELY.** MARKET VALUE WILL BE REDUCED BY EXEMPTIONS WHERE APPROPRIATE AND APPROVED TO OBTAIN TAXABLE VALUE.

POSSIBLE EXEMPTIONS (AS THEY MAY APPEAR ON STATEMENT):

1. **HS001 - HOMESTEAD.** THIS EXEMPTION IS STATE MANDATED FOR SCHOOL DISTRICTS ONLY AND **MAY** BE AUTHORIZED BY ANY TAXING ENTITY. NOTE: THE COLLIN COUNTY COMMUNITY COLLEGE DISTRICT DOES NOT OFFER THIS EXEMPTION AT THIS TIME.
2. **OV003 - OVER AGE 65.** THIS EXEMPTION IS STATE MANDATED FOR SCHOOL DISTRICTS ONLY AND **MAY** BE AUTHORIZED BY ANY TAXING ENTITY.
3. **DP005 - DISABLED.** THIS EXEMPTION WILL BE RECOGNIZED AS AUTHORIZED BY ANY TAXING ENTITY.
4. **DV001-DV004 - VETERAN.** THIS IS A STATE MANDATED EXEMPTION. THE EXEMPTION ALLOWED IS BASED UPON THE PERCENTAGE OF DISABILITY CERTIFIED BY THE VETERANS ADMINISTRATION, TO A MAXIMUM OF \$12,000.

WHEN YOU PROVIDE A CHECK AS PAYMENT, YOU AUTHORIZE US EITHER TO USE INFORMATION FROM YOUR CHECK TO MAKE A ONE-TIME ELECTRONIC FUND TRANSFER FROM YOUR ACCOUNT OR TO PROCESS THE PAYMENT AS A CHECK TRANSACTION. WHEN WE USE INFORMATION FROM YOUR CHECK TO MAKE AN ELECTRONIC FUND TRANSFER, FUNDS MAY BE WITHDRAWN FROM YOUR ACCOUNT AS SOON AS THE SAME DAY WE RECEIVE YOUR PAYMENTS, AND YOU WILL NOT RECEIVE YOUR CHECK BACK FROM YOUR FINANCIAL INSTITUTION.

BE SURE TO ENCLOSE THE STUB PORTION OF YOUR TAX STATEMENT WHEN YOU PAY BY MAIL. SEND CHECK OR MONEY ORDER. CREDIT CARDS MAY BE PROCESSED THROUGH CERTIFIED PAYMENTS, INC. THERE WILL BE A NOMINAL FEE FOR THIS SERVICE. SEE FRONT OF THIS STATEMENT. DO NOT SEND CASH THROUGH THE MAIL. IF YOU WISH TO PAY IN PERSON, YOU MAY PAY AT THE TAX OFFICE (ADDRESSES LISTED ON FRONT PAGE). **BE SURE TO WRITE YOUR ACCOUNT NUMBER ON YOUR CHECK TO INSURE PROPER CREDIT.**

Attachment C-
Line Item 1
Property Tax Statement
(Homeowner)
Page 2-front and back

Information about Property Values and Taxes

From the files of Kenneth L. Maun, Tax Assessor Collector of Collin County

The following information show what values, exemptions, tax rates and tax levies have been on this property for the last six years for each entity by whom taxed, and the percentage change from the prior year. A five year comparison is just below that.

ACCOUNT HISTORY

Account # XXXXXXXXXX

Tax Year	Appraised Value	Appraisal % Chg	Exemption Amount	Taxable Value	Value % Chg	Tax Rate Per \$100	Rate % Chg	Tax	Tax % Chg
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MAINTENANCE AND DEBT RATE INFORMATION

TAX YEAR	MAINT RATE	DEBT RATE
2015	1.170000	0.269000
2014	1.170000	0.278000

PLANO ISD

NOTE: Maint Rate = Maintenance and Operations Tax rate and Debt Rate = Interest and Sinking Tax Rate Changes in exemptions or freezes can make a big change in the percentage calculations. Data is not shown where information was not available. The most common reason the information was not available is that the County Tax Office was not collecting for the entity for those years or the tax record did not exist in the prior years.

APPRAISAL DISTRICT INFORMATION

COLLIN CENTRAL APPRAISAL DISTRICT

250 W. Eldorado Parkway
McKinney, TX 75069-8023
Phone: 469-742-9200
Fax: 469-742-9207
Web site: www.collincad.org

DENTON CENTRAL APPRAISAL DISTRICT

3911 Morse Street
P O Box 2816
Denton TX 76208-2816
Phone: 940-349-3800
Fax: 940-349-3801
Web site: www.dentoncad.com

FANNIN CENTRAL APPRAISAL DISTRICT

831 W. State Hwy. 56
Bonham, TX 75418-8604
Phone: 903-583-8701
Fax: 903-583-8015
Web site: www.fannincad.org

HUNT CENTRAL APPRAISAL DISTRICT

4801 King St.
P O Box 1339
Greenville, TX 75403-1339
Phone: 903-454-3510
Fax: 903-454-4160
Web site: www.hunt-cad.org

GRAYSON CENTRAL APPRAISAL DISTRICT

205 N. Travis Street
Sherman, TX 75090-5922
Phone: 903-893-9673
Fax: 903-892-3835
Web site: www.graysonappraisal.org

DALLAS CENTRAL APPRAISAL DISTRICT

2949 N. Stemmons Frwy.
Dallas, TX 75247-6195
Phone: 214-631-0910
Web site: www.dallascad.org

ROCKWALL CENTRAL APPRAISAL DISTRICT

841 Justin Rd.
Rockwall, TX 75087-4842
Phone: 972-771-2034
Fax: 972-771-6871
Web site: www.rockwallcad.com

Attachment D-

Line Item 1

Property Tax Statement

(Mortgage Company)

Page 1-front and back

2015
PROPERTY TAX STATEMENT

KENNETH L. MAUN
TAX ASSESSOR COLLECTOR
COLLIN COUNTY

OFFICE LOCATIONS

2300 BLOOMDALE RD. STE. 2324
MCKINNEY, TX 75071

920 E. PARK BLVD. STE. 100
PLANO, TX 75034

6101 FRISCO SQUARE BLVD. STE. 2000
FRISCO, TX 75034

ACCOUNT NUMBER

[REDACTED]

P.O. BOX 8046
MCKINNEY, TEXAS 75070-8046
972-547-5020
METRO 972-424-1460 EXT. 5020

IF YOU ARE 65 YEARS OF AGE OR OLDER OR ARE DISABLED AND YOU OCCUPY THE PROPERTY DESCRIBED IN THIS DOCUMENT AS YOUR RESIDENCE HOMESTEAD, YOU SHOULD CONTACT THE APPRAISAL DISTRICT REGARDING ANY ENTITLEMENT YOU MAY HAVE TO A POSTPONEMENT IN THE PAYMENT OF THESE TAXES.

OWNER NAME AND ADDRESS

PROPERTY DESCRIPTION

[REDACTED]

[REDACTED]

SITUS: [REDACTED]

OWNER ID: [REDACTED]

EXEMPTIONS:

Property Class	Land Value	Agricultural Exclusion	Improvement Value	Personal Property	Appraised Value (Market)	Homestead Cap	Assessed Value
Qualifying	0	0	0	0	0	0	0
Non Qualifying	4,758,320	0	20,923,625	0	25,681,945	0	25,681,945
Agricultural	0	0	0	0	0	0	0
Total	4,758,320	0	20,923,625	0	25,681,945	0	25,681,945

TAXING ENTITY	ASSESSED VALUE	EXEMPTION AMOUNT	TAXABLE VALUE	TAX RATE	YEAR	CEILING AMOUNT	TAXES BY ENTITY
COLLIN COUNTY	25,681,945	0	25,681,945	0.225000			57,784.38
PLANO CITY	25,681,945	0	25,681,945	0.488600			125,481.98
COLLIN COLLEGE	25,681,945	0	25,681,945	0.081960			21,048.92
PLANO ISD	25,681,945	0	25,681,945	1.439000			369,563.19

Visit www.certifiedpayments.net to pay by electronic check or credit card
Bureau code # 5475020



Convenience fee charged.
or call Certified Payments at 1-877-264-7533
credit card only - no electronic checks by phone

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1st INSTALLMENT

[REDACTED]

TOTAL TAXES DUE NOW

\$573,878.47

DELINQUENT 2/1/2016

YOUR CHECK WILL BE CONVERTED INTO AN ELECTRONIC FUND TRANSFER.

DETACH HERE AND RETURN BOTTOM PORTION WITH YOUR PAYMENT.

IF THERE IS AN ERROR IN OWNERSHIP, EXEMPTIONS OR JURISDICTIONS, YOU MUST CONTACT THE CENTRAL APPRAISAL DISTRICT.

ACCOUNT NUMBER

[REDACTED]

Taxes will be delinquent on Feb. 1, 2016
Unpaid tax balance will incur the following penalty & interest.
Amount due if paid in:

TOTAL TAXES DUE DELINQUENT
Feb. 1, 2016

\$573,878.47

MORTGAGE COMPANY

MORTGAGE NO.

LOAN NO.

[REDACTED]

[REDACTED]

[REDACTED]

FEBRUARY + 7%	614,049.96
MARCH + 9%	625,527.53

PLEASE MAKE ADDRESS CORRECTIONS HERE.

MAKE CHECK PAYABLE TO:

KENNETH L. MAUN
TAX ASSESSOR COLLECTOR
COLLIN COUNTY
P.O. BOX 8046
MCKINNEY, TX 75070-8046

[REDACTED]



20150R388000A0010100573878470061404996006255275300000000000C01

INFORMATION ON TAXES

Assessment Ratio 100%

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OVER AGE 65/DISABILITY INSTALLMENT PAYMENT OF HOMESTEAD TAXES OPTION

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EXEMPTIONS:

CAREFULLY REVIEW YOUR EXEMPTIONS ON FACE OF STATEMENT. IF THE EXEMPTIONS SHOWN ARE NOT ACCURATE, OR IF YOU HAVE ANY QUESTIONS ABOUT YOUR EXEMPTIONS, **CALL THE CENTRAL APPRAISAL DISTRICT IMMEDIATELY.** MARKET VALUE WILL BE REDUCED BY EXEMPTIONS WHERE APPROPRIATE AND APPROVED TO OBTAIN TAXABLE VALUE.

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1. **HS001 - HOMESTEAD.** THIS EXEMPTION IS STATE MANDATED FOR SCHOOL DISTRICTS ONLY AND **MAY** BE AUTHORIZED BY ANY TAXING ENTITY. NOTE: THE COLLIN COUNTY COMMUNITY COLLEGE DISTRICT DOES NOT OFFER THIS EXEMPTION AT THIS TIME.
2. **OV003 - OVER AGE 65.** THIS EXEMPTION IS STATE MANDATED FOR SCHOOL DISTRICTS ONLY AND **MAY** BE AUTHORIZED BY ANY TAXING ENTITY.
3. **DP005 - DISABLED.** THIS EXEMPTION WILL BE RECOGNIZED AS AUTHORIZED BY ANY TAXING ENTITY.
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WHEN YOU PROVIDE A CHECK AS PAYMENT, YOU AUTHORIZE US EITHER TO USE INFORMATION FROM YOUR CHECK TO MAKE A ONE-TIME ELECTRONIC FUND TRANSFER FROM YOUR ACCOUNT OR TO PROCESS THE PAYMENT AS A CHECK TRANSACTION. WHEN WE USE INFORMATION FROM YOUR CHECK TO MAKE AN ELECTRONIC FUND TRANSFER, FUNDS MAY BE WITHDRAWN FROM YOUR ACCOUNT AS SOON AS THE SAME DAY WE RECEIVE YOUR PAYMENTS, AND YOU WILL NOT RECEIVE YOUR CHECK BACK FROM YOUR FINANCIAL INSTITUTION.

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Attachment E-

Line Item 1

Property Tax Statement

(Mortgage Company)

Page 2-front and back

Information about Property Values and Taxes
From the files of Kenneth L. Maun, Tax Assessor Collector of Collin County

The following information show what values, exemptions, tax rates and tax levies have been on this property for the last six years for each entity by whom taxed, and the percentage change from the prior year. A five year comparison is just below that.

ACCOUNT HISTORY									
Tax Year	Appraised Value	Appraisal % Chg	Exemption Amount	Taxable Value	Value % Chg	Tax Rate Per \$100	Rate % Chg	Tax	Tax % Chg
COLLIN COLLEGE									
2015	25,681,945	5.25%	0	25,681,945	5.25%	0.081960	0.00%	\$21,048.92	5.25%
2014	24,400,000	6.81%	0	24,400,000	6.81%	0.081960	-2.01%	\$19,998.24	4.67%
2013	22,842,200	6.24%	0	22,842,200	6.24%	0.083643	-3.08%	\$19,105.90	2.97%
2012	21,500,000	10.25%	0	21,500,000	10.25%	0.086299	0.00%	\$18,554.28	10.25%
2011	19,500,000	12.82%	0	19,500,000	12.82%	0.086300	0.00%	\$16,828.50	12.82%
2010	17,283,503	0.00%	0	17,283,503	0.00%	0.086300	0.00%	\$14,915.66	0.00%
5 YR COMPARISON									
2015	25,681,945	48.59%	0	25,681,945	48.59%	0.081960	-5.03%	\$21,048.92	41.11%
2010	17,283,503	0.00%	0	17,283,503	0.00%	0.086300	0.00%	\$14,915.66	0.00%
COLLIN COUNTY									
2015	25,681,945	5.25%	0	25,681,945	5.25%	0.225000	-4.26%	\$57,784.38	0.77%
2014	24,400,000	6.81%	0	24,400,000	6.81%	0.235000	-1.05%	\$57,340.00	5.69%
2013	22,842,200	6.24%	0	22,842,200	6.24%	0.237500	-1.04%	\$54,250.22	5.13%
2012	21,500,000	10.25%	0	21,500,000	10.25%	0.240000	0.00%	\$51,600.00	10.25%
2011	19,500,000	12.82%	0	19,500,000	12.82%	0.240000	0.00%	\$46,800.00	12.82%
2010	17,283,503	0.00%	0	17,283,503	0.00%	0.240000	0.00%	\$41,480.41	0.00%
5 YR COMPARISON									
2015	25,681,945	48.59%	0	25,681,945	48.59%	0.225000	-6.25%	\$57,784.38	39.30%
2010	17,283,503	0.00%	0	17,283,503	0.00%	0.240000	0.00%	\$41,480.41	0.00%
PLANO CITY									
2015	25,681,945	5.25%	0	25,681,945	5.25%	0.488600	0.00%	\$125,481.98	5.25%
2014	24,400,000	6.81%	0	24,400,000	6.81%	0.488600	0.00%	\$119,218.40	6.81%
2013	22,842,200	6.24%	0	22,842,200	6.24%	0.488600	0.00%	\$111,606.99	6.24%
2012	21,500,000	10.25%	0	21,500,000	10.25%	0.488600	0.00%	\$105,049.00	10.25%
2011	19,500,000	12.82%	0	19,500,000	12.82%	0.488600	0.00%	\$95,277.00	12.82%
2010	17,283,503	0.00%	0	17,283,503	0.00%	0.488600	0.00%	\$84,447.20	0.00%
5 YR COMPARISON									
2015	25,681,945	48.59%	0	25,681,945	48.59%	0.488600	0.00%	\$125,481.98	48.59%
2010	17,283,503	0.00%	0	17,283,503	0.00%	0.488600	0.00%	\$84,447.20	0.00%
PLANO ISD									
2015	25,681,945	5.25%	0	25,681,945	5.25%	1.439000	-0.62%	\$369,563.19	4.59%
2014	24,400,000	6.81%	0	24,400,000	6.81%	1.448000	-0.34%	\$353,312.00	6.45%
2013	22,842,200	6.24%	0	22,842,200	6.24%	1.453000	5.80%	\$331,897.17	12.40%
2012	21,500,000	10.25%	0	21,500,000	10.25%	1.373400	0.00%	\$295,281.00	10.25%
2011	19,500,000	12.82%	0	19,500,000	12.82%	1.373400	1.48%	\$267,813.00	14.49%
2010	17,283,503	0.00%	0	17,283,503	0.00%	1.353400	0.00%	\$233,914.93	0.00%
5 YR COMPARISON									
2015	25,681,945	48.59%	0	25,681,945	48.59%	1.439000	6.32%	\$369,563.19	57.99%
2010	17,283,503	0.00%	0	17,283,503	0.00%	1.353400	0.00%	\$233,914.93	0.00%



MAINTENANCE AND DEBT RATE INFORMATION

TAX YEAR	MAINT RATE	DEBT RATE
2015	1.170000	0.269000
2014	1.170000	0.278000

PLANO ISD

NOTE: Maint Rate = Maintenance and Operations Tax rate and Debt Rate = Interest and Sinking Tax Rate Changes in exemptions or freezes can make a big change in the percentage calculations. Data is not shown where information was not available. The most common reason the information was not available is that the County Tax Office was not collecting for the entity for those years or the tax record did not exist in the prior years.

APPRAISAL DISTRICT INFORMATION

COLLIN CENTRAL APPRAISAL DISTRICT

250 W. Eldorado Parkway
McKinney, TX 75069-8023
Phone: 469-742-9200
Fax: 469-742-9207
Web site: www.collincad.org

DENTON CENTRAL APPRAISAL DISTRICT

3911 Morse Street
P O Box 2816
Denton TX 76208-2816
Phone: 940-349-3800
Fax: 940-349-3801
Web site: www.dentoncad.com

FANNIN CENTRAL APPRAISAL DISTRICT

831 W. State Hwy. 56
Bonham, TX 75418-8604
Phone: 903-583-8701
Fax: 903-583-8015
Web site: www.fannincad.org

HUNT CENTRAL APPRAISAL DISTRICT

4801 King St.
P O Box 1339
Greenville, TX 75403-1339
Phone: 903-454-3510
Fax: 903-454-4160
Web site: www.hunt-cad.org

GRAYSON CENTRAL APPRAISAL DISTRICT

205 N. Travis Street
Sherman, TX 75090-5922
Phone: 903-893-9673
Fax: 903-892-3835
Web site: www.graysonappraisal.org

DALLAS CENTRAL APPRAISAL DISTRICT

2949 N. Stemmons Frwy.
Dallas, TX 75247-6195
Phone: 214-631-0910
Web site: www.dallascad.org

ROCKWALL CENTRAL APPRAISAL DISTRICT

841 Justin Rd.
Rockwall, TX 75087-4842
Phone: 972-771-2034
Fax: 972-771-6871
Web site: www.rockwallcad.com

Attachment F-
Line Item 2
February Statement
(Blue)



**DELINQUENT TAX STATEMENT
KENNETH L. MAUN**

TAX ASSESSOR COLLECTOR
COLLIN COUNTY
2300 BLOOMDALE RD, STE 2324
P.O.BOX 8046
McKINNEY, TX 75070-8046
(972) 547-5020
METRO (972) 424-1460 EXT 5020

Date: 02-10-2016

Legal Desc: [REDACTED]

Account#: [REDACTED]

Address: [REDACTED]

Parcel: [REDACTED]

YEAR	TAX UNIT	TAX LEVY REMAINING	IF PAID IN FEBRUARY		IF PAID IN MARCH		IF PAID IN APRIL	
			PENALTY & INTEREST	TOTAL	PENALTY & INTEREST	TOTAL	PENALTY & INTEREST	TOTAL
2009	COMMUNITY ISD	16.30	19.89	36.19	20.08	36.38	20.29	36.59
2010	COMMUNITY ISD	2,081.04	2,239.19	4,320.23	2,264.16	4,345.20	2,289.14	4,370.18
2011	COMMUNITY ISD	2,081.04	1,939.52	4,020.56	1,964.50	4,045.54	1,989.47	4,070.51
2012	COLLIN COLLEGE	120.13	94.67	214.80	96.11	216.24	97.55	217.68
2012	COLLIN COUNTY	334.08	263.26	597.34	267.26	601.34	271.27	605.35
2012	COMMUNITY ISD	2,262.00	1,782.46	4,044.46	1,809.60	4,071.60	1,836.74	4,098.74
2012	JOSEPHINE CITY	273.14	194.89	468.03	198.03	471.17	201.17	474.31
2013	COLLIN COLLEGE	116.43	74.98	191.41	76.37	192.80	77.78	194.21
2013	COLLIN COUNTY	330.60	212.90	543.50	216.88	547.48	220.84	551.44
2013	COMMUNITY ISD	2,262.00	1,456.73	3,718.73	1,483.87	3,745.87	1,511.02	3,773.02
2013	JOSEPHINE CITY	282.73	162.71	445.44	165.97	448.70	169.22	451.95
2014	COLLIN COLLEGE	114.09	57.04	171.13	58.41	172.50	59.78	173.87
2014	COLLIN COUNTY	327.12	163.56	490.68	167.48	494.60	171.41	498.53
2014	COMMUNITY ISD	2,248.08	1,124.04	3,372.12	1,151.02	3,399.10	1,177.99	3,426.07
2014	JOSEPHINE CITY	294.71	128.94	423.65	132.33	427.04	135.72	430.43

continued on next page

IF THE PROPERTY DESCRIBED IN THIS DOCUMENT IS YOUR RESIDENCE HOMESTEAD, YOU SHOULD CONTACT THE COLLIN COUNTY TAX OFFICE REGARDING A RIGHT YOU MAY HAVE TO ENTER INTO AN INSTALLMENT AGREEMENT DIRECTLY WITH THE COLLIN COUNTY TAX OFFICE FOR THE PAYMENT OF THESE TAXES. IF YOU ARE 65 YEARS OF AGE OR OLDER OR ARE DISABLED AND THE PROPERTY DESCRIBED IN THIS DOCUMENT IS YOUR RESIDENCE HOMESTEAD, YOU SHOULD CONTACT THE APPRAISAL DISTRICT REGARDING ANY ENTITLEMENT YOU MAY HAVE TO A POSTPONEMENT IN THE PAYMENT OF THESE TAXES.

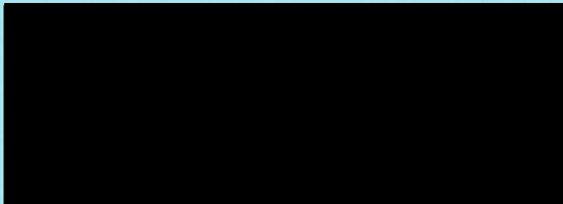
THE TAXES ON THIS PROPERTY ARE DELINQUENT. THE PROPERTY IS SUBJECT TO A LIEN FOR THE DELINQUENT TAXES. IF THE DELINQUENT TAXES ARE NOT PAID THE LIEN MAY BE FORECLOSED ON.

PLEASE RETURN BOTTOM PORTION WITH YOUR PAYMENT

**PER SECT 33.11 OF THE TEXAS
PROP TAX CODE, AN ADDITIONAL
PENALTY OF 15-20% MAY BE
ADDED ON APRIL 1ST**

Account Number	Month Paid	Amount Paid
[REDACTED]	FEBRUARY	\$26,243.46
	MARCH	\$26,460.28
	APRIL	\$26,677.15
	Amount of Your Check	\$

IF THERE IS AN ERROR IN OWNERSHIP OR JURISDICTION, YOU MUST CONTACT THE CENTRAL APPRAISAL DISTRICT FOR CORRECTIONS.



MAKE CHECK PAYABLE TO:
KENNETH L. MAUN
TAX ASSESSOR COLLECTOR
COLLIN COUNTY
P.O.BOX 8046
McKINNEY, TX 75070-8046





Account Number: [REDACTED]

YEAR	TAX UNIT	TAX LEVY REMAINING	IF PAID IN FEBRUARY		IF PAID IN MARCH		IF PAID IN APRIL	
			PENALTY & INTEREST	TOTAL	PENALTY & INTEREST	TOTAL	PENALTY & INTEREST	TOTAL
2015	COLLIN COLLEGE	114.09	7.99	122.08	10.27	124.36	12.55	126.64
2015	COLLIN COUNTY	313.20	21.92	335.12	28.18	341.38	34.46	347.66
2015	COMMUNITY ISD	2,262.00	158.34	2,420.34	203.58	2,465.58	248.82	2,510.82
2015	JOSEPHINE CITY	287.52	20.13	307.65	25.88	313.40	31.63	319.15
TOTAL AMOUNT DUE				\$26,243.46		\$26,460.28		\$26,677.15

**Attachment G-
Line Item 3
May Statement
(Pink) Page 1**



1099

DELINQUENT TAX STATEMENT

KENNETH L. MAUN

TAX ASSESSOR COLLECTOR
COLLIN COUNTY
2300 BLOOMDALE RD, STE 2324
P.O. BOX 8046
McKINNEY, TX 75070-8046
(972) 547-5020
METRO (972) 424-1460 EXT 5020

Date: 05-08-2015

Legal Desc: [REDACTED]

Account#: [REDACTED]

Parcel: [REDACTED]

Address: [REDACTED]

YEAR	TAX UNIT	TAX LEVY REMAINING	IF PAID IN MAY		IF PAID IN JUNE		IF PAID IN JULY	
			PENALTY & INTEREST	TOTAL	PENALTY & INTEREST	TOTAL	PENALTY & INTEREST	TOTAL
2014	CELINA CITY	17.74	5.30	23.04	5.72	23.46	6.34	24.08
2014	CELINA ISD	45.10	16.06	61.16	17.14	62.24	18.77	63.87
2014	COLLIN COLLEGE	2.26	0.80	3.06	0.86	3.12	0.94	3.20
2014	COLLIN COUNTY	6.47	2.30	8.77	2.46	8.93	2.70	9.17
TOTAL AMOUNT DUE				\$96.03		\$97.75		\$100.32

IF THE PROPERTY DESCRIBED IN THIS DOCUMENT IS YOUR RESIDENCE HOMESTEAD, YOU SHOULD CONTACT THE COLLIN COUNTY TAX OFFICE REGARDING A RIGHT YOU MAY HAVE TO ENTER INTO AN INSTALLMENT AGREEMENT DIRECTLY WITH THE COLLIN COUNTY TAX OFFICE FOR THE PAYMENT OF THESE TAXES. IF YOU ARE 65 YEARS OF AGE OR OLDER OR ARE DISABLED AND THE PROPERTY DESCRIBED IN THIS DOCUMENT IS YOUR RESIDENCE HOMESTEAD, YOU SHOULD CONTACT THE APPRAISAL DISTRICT REGARDING ANY ENTITLEMENT YOU MAY HAVE TO A POSTPONEMENT IN THE PAYMENT OF THESE TAXES.

THE TAXES ON THIS PROPERTY ARE DELINQUENT. THE PROPERTY IS SUBJECT TO A LIEN FOR THE DELINQUENT TAXES. IF THE DELINQUENT TAXES ARE NOT PAID THE LIEN MAY BE FORECLOSED ON.

PLEASE RETURN BOTTOM PORTION WITH YOUR PAYMENT

Account Number	Month Paid	Amount Paid
[REDACTED]	MAY	\$96.03
	JUNE	\$97.75
	JULY	\$100.32
	Amount of Your Check	\$

IF THERE IS AN ERROR IN OWNERSHIP OR JURISDICTION, YOU MUST CONTACT THE CENTRAL APPRAISAL DISTRICT FOR CORRECTIONS.

MAKE CHECK PAYABLE TO:
KENNETH L. MAUN
TAX ASSESSOR COLLECTOR
COLLIN COUNTY
P.O. BOX 8046
McKINNEY, TX 75070-8046

46-1

5B



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Attachment H-
Line Item 3
May Statement
Page 2



KENNETH L. MAUN
Tax Assessor Collector
Collin County
2300 Bloomdale Rd., Suite 2324
P. O. Box 8046
McKinney, Texas 75070-8046
972-547-5020
FAX 972-547-5053
Metro 972-424-1460 Ext. 5020

Collin County Property Owner:

May 11, 2015

The enclosed delinquent tax statement indicates these taxes were not paid in full by April 30, 2015. If payment was made prior to April 30th, please call our office so we may review our records.

Should your mortgage company pay your taxes, please contact them. If they are at fault for late payment, I'm sure they would want to assist in the payment of any necessary penalty and interest.

After January 31, 2015, all 2014 taxes remaining unpaid are considered delinquent. Delinquent taxes require penalty and interest totaling 13% if paid in May, and 15% if paid in June. The penalty and interest percentage continues to increase until delinquent taxes are paid.

Should the 2014 taxes still be due on July 1, 2015, an additional 15% - 20% will be charged (resulting in a total additional charge of 33% - 38%). For business personal property accounts this can happen as early as April 1st. This additional 15% - 20% collection will help pay the attorney fees for assisting in the collection of delinquent taxes. These penalties and interest are specified in the Texas Property Tax Code and cannot be waived.

I would appreciate your help in the collection of these taxes. Uncollected taxes cause owners of Collin County property to carry an extra burden.

Thank you for your help,

Kenneth L. Maun
Tax Assessor Collector

Attachment I-
Line Item 4
July Statement
(Mint Green)
Attorney

**Attachment J-
#9 Non-Standard
Return Envelope**

Name

Address

City

State

Zip



Postage
Required
Post Office will
not deliver
without proper
postage.

KENNETH L. MAUN
TAX ASSESSOR COLLECTOR
COLLIN COUNTY
P.O. BOX 8046
MCKINNEY TX 75070-8046



Attachment K-
#10 Window Mailing
Envelopes
(blue) front

Attachment L-
#10 Window Mailing
Envelopes
(blue) back

INFORMATION REGARDING CONFLICT OF INTEREST QUESTIONNAIRE

During the 79th Legislative Session, House Bill 914 was signed into law effective September 1, 2015, which added Chapter 176 to the Texas Local Government Code. Recent changes have been made to Chapter 176 pursuant to HB23, which passed the 84th Legislative Session. Chapter 176 mandates the public disclosure of certain information concerning persons doing business or seeking to do business with Collin County, including family, business, and financial relationships such persons may have with Collin County officers or employees involved in the planning, recommending, selecting and contracting of a vendor for this procurement.

For a copy of Form CIQ and CIS:

http://www.ethics.state.tx.us/filinginfo/conflict_forms.htm

The vendor acknowledges by doing business or seeking to do business with Collin County that he/she has been notified of the requirements under Chapter 176 of the Texas Local Government Code and that he/she is solely responsible for complying with the terms and conditions therein. Furthermore, any individual or business entity seeking to do business with Collin County who does not comply with this practice may risk award consideration of any County contract.

For a listing of current Collin County Officers:

<http://www.collincountytexas.gov/government/Pages/officials.aspx>

The following County employees will be involved in the planning, recommending, selecting, and contracting for the attached procurement:

Department/Evaluation Team:

Kenneth Maun, Tax Assessor
Laura Boatright, Chief Deputy Clerk
Sandy Cline, Senior Clerk

Purchasing:

Michalyn Rains, CPPB, CPPO – Purchasing Agent
Sara Hogle, CPPB – Asst. Purchasing Agent
Courtney Wilkerson, Senior Buyer

Commissioners' Court:

Keith Self – County Judge
Susan Fletcher – Commissioner Precinct No. 1
Cheryl Williams – Commissioner Precinct No. 2
Chris Hill – Commissioner Precinct No. 3
Duncan Webb – Commissioner Precinct No. 4

CONFLICT OF INTEREST QUESTIONNAIRE

For vendor doing business with local governmental entity

FORM CIQ

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

OFFICE USE ONLY

Date Received

1 Name of vendor who has a business relationship with local governmental entity.

2 Check this box if you are filing an update to a previously filed questionnaire. (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

3 Name of local government officer about whom the information is being disclosed.

Name of Officer

4 Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

Yes No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

Yes No

5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.

6 Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).

7

Signature of vendor doing business with the governmental entity

Date

CONFLICT OF INTEREST QUESTIONNAIRE

For vendor doing business with local governmental entity

A complete copy of Chapter 176 of the Local Government Code may be found at <http://www.statutes.legis.state.tx.us/Docs/LG/htm/LG.176.htm>. For easy reference, below are some of the sections cited on this form.

Local Government Code § 176.001(1-a): "Business relationship" means a connection between two or more parties based on commercial activity of one of the parties. The term does not include a connection based on:

- (A) a transaction that is subject to rate or fee regulation by a federal, state, or local governmental entity or an agency of a federal, state, or local governmental entity;
- (B) a transaction conducted at a price and subject to terms available to the public; or
- (C) a purchase or lease of goods or services from a person that is chartered by a state or federal agency and that is subject to regular examination by, and reporting to, that agency.

Local Government Code § 176.003(a)(2)(A) and (B):

(a) A local government officer shall file a conflicts disclosure statement with respect to a vendor if:

(2) the vendor:

(A) has an employment or other business relationship with the local government officer or a family member of the officer that results in the officer or family member receiving taxable income, other than investment income, that exceeds \$2,500 during the 12-month period preceding the date that the officer becomes aware that

- (i) a contract between the local governmental entity and vendor has been executed;
- or
- (ii) the local governmental entity is considering entering into a contract with the vendor;

(B) has given to the local government officer or a family member of the officer one or more gifts that have an aggregate value of more than \$100 in the 12-month period preceding the date the officer becomes aware that:

- (i) a contract between the local governmental entity and vendor has been executed; or
- (ii) the local governmental entity is considering entering into a contract with the vendor.

Local Government Code § 176.006(a) and (a-1)

(a) A vendor shall file a completed conflict of interest questionnaire if the vendor has a business relationship with a local governmental entity and:

- (1) has an employment or other business relationship with a local government officer of that local governmental entity, or a family member of the officer, described by Section 176.003(a)(2)(A);
- (2) has given a local government officer of that local governmental entity, or a family member of the officer, one or more gifts with the aggregate value specified by Section 176.003(a)(2)(B), excluding any gift described by Section 176.003(a-1); or
- (3) has a family relationship with a local government officer of that local governmental entity.

(a-1) The completed conflict of interest questionnaire must be filed with the appropriate records administrator not later than the seventh business day after the later of:

(1) the date that the vendor:

- (A) begins discussions or negotiations to enter into a contract with the local governmental entity; or
- (B) submits to the local governmental entity an application, response to a request for proposals or bids, correspondence, or another writing related to a potential contract with the local governmental entity; or

(2) the date the vendor becomes aware:

- (A) of an employment or other business relationship with a local government officer, or a family member of the officer, described by Subsection (a);
- (B) that the vendor has given one or more gifts described by Subsection (a); or
- (C) of a family relationship with a local government officer.

