

IPTI Annual Corporate Property Tax Workshop

Challenges in Managing Property Tax Portfolios

in Current Economic Environment



TUESDAY, MAY 23, 2023

Prologis Offices • 6250 North River Road, Suite 1100 • Rosemont, (Chicago) Illinois, 60018

PREMABLE: The corporate property tax managers are dealing with difficult business conditions. This includes rising inflation and higher interest rates which have a negative impact on their company's performance. The COVID pandemic has created additional challenges which also included changing consumer behavior. Some of the challenges include the inability to easily analyse property assessments based on current market conditions.

This one-day workshop, hosted by IPTI's Corporate Advisory Committee, will provide an opportunity for experience sharing and interactive discussion.

AGENDA

Time	Topic	Session Leaders
8:45	Coffee and Networking	
9:15	Workshop Objectives Introductory Comments	Marc Sances, Prologis Jerry Grad, IPTI
9:30	Property Tax Legislation and Litigation - Recent Developments and Case Law	Paul Dooley, KIMCO David Wilkes, Herman Katz
10:15	The Good, the Bad and the Ugly - What can we Learn from other Jurisdictions? <ul style="list-style-type: none"> Positive and Negative Developments in other Countries/Jurisdictions What can we Learn from Others? 	Jerry Grad, IPTI
11:00	Break	
11:20	Dealing with Current Challenges in Managing Property Taxation <ul style="list-style-type: none"> What are the Challenges? Dealing with Business and Economic Realities Impact on Municipal Assessments and Property Taxation 	Marc Sances, Prologis Connie Ellis, Revantage
12:15	Lunch	
1:00	Mastering the Art of Negotiating a Tax Appeal - Using your Eyes and Ears as well as your Mouth to get to "Yes"	David Wilkes, Herman Katz
1:40	Data and Data Sources - What Corporate Managers use for Analysis and Management Reports? <ul style="list-style-type: none"> Data Sources (Internal and External) Collection and Management Data for Forecasting, Budgeting, Reporting and Appeals 	Bradford Dunn, TJX Brian Grossman, Walgreens Kathleen Suvanich, Walgreens Mordechai Katzman, Rethink Solutions Inc
2:35	Discussion <ul style="list-style-type: none"> Topics of interest Current Issues and Challenges Experience sharing Future Programing 	All Participants
3:15	Summary and Next Steps	
3:30	Workshop Concludes	

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Fees & Registration:

The workshop is free of charge for IPTI CAC Members.

The workshop is open to corporate representatives. Fee includes workshop material and lunch.

Accommodation is not included.

Registration Fee **\$95.00 US/pp**

To register for the workshop please click [HERE](#)

Cancellation Policy: Refunds are not available; however, substitutes are welcome. Notification of substitutions must be identified 48 hours in advance of the workshop.

Sponsored by:



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