

**Dallas Central Appraisal District**

2949 N. Stemmons Freeway, Dallas

Direct Mailing Address: PO Box 560328 Dallas, Texas 75356-0328

(214) 631-1342 or www.dallascad.org**Exemption Application for Private School for _____
Year****Account Number/s:** _____

GENERAL INSTRUCTIONS: This application is for use in claiming property tax exemptions pursuant to Tax Code §11.21. This application covers property you owned on January 1 of this year or acquired during this year. You must furnish all information and documentation required by the application.

APPLICATION DEADLINES: You must file the completed application with all required documentation between January 1 and no later than April 30 of the year for which you are requesting an exemption. If you acquired the property after January 1 of this year and wish to qualify for the exemption this year, you must apply before the first anniversary of the date you acquired the property or before the first anniversary of the date any property was acquired after January 1.

If the chief appraiser grants the exemption, you do not need to reapply annually, but you must reapply if the chief appraiser requires you to do so, or if you want the exemption to apply to property not listed on this application. You must notify the chief appraiser in writing if and when your right to this exemption ends. Return the completed form and all required documentation to the mailing address above.

Step 1: Provide Name and Mailing Address of Organization and Identity of Person Preparing Application_____
Name of School_____
Current Mailing Address (number and street)_____
City, State, ZIP Code_____
Phone (area code and number)_____
Name of Person Preparing this Application_____
Title_____
Driver's License, Personal ID or Social Security Number*

If this application is for an exemption from ad valorem taxation of property owned by a charitable organization with a federal tax identification number, that number may be provided here in lieu of a driver's license number, personal identification certificate number, or social security number:_____.

* Unless the applicant is a charitable organization with a federal tax identification number, the applicant's driver's license number, personal identification certificate number, or social security account number is required. Pursuant to Tax Code §11.48(a), a driver's license number, personal identification certificate number, or social security account number provided in an application for an exemption filed with a chief appraiser is confidential and not open to public inspection. The information may not be disclosed to anyone other than an employee of the appraisal office who appraises property, except as authorized by Tax Code §11.48(b). If the applicant is a charitable organization with a federal tax identification number, the applicant may provide the organization's federal tax identification number in lieu of a driver's license number, personal identification certificate number, or social security account number.

Step 2: Provide Name and Mailing Address of School Owner_____
Name of School Owner_____
Current Mailing Address (if different from above)_____
City, State, ZIP Code_____
Phone (area code and number)

Operator of School is a(n) (check one):

☐ Individual☐ Partnership☐ Corporation☐ Other (specify): _____

Step 3: Answer these Questions About the School

1. Does anyone other than the owner operate the school? Yes ☐ No ☐
If "YES", is the operator the former owner of the property? Yes ☐ No ☐
2. Does the school maintain a regular faculty and curriculum? Yes ☐ No ☐
3. Does the school have a regularly organized body of students? Yes ☐ No ☐
4. Do classes normally meet at one of the buildings to be exempted? Yes ☐ No ☐

Step 4: Answer these Questions About the School's Finances

In the past year has the organization loaned funds to, borrowed funds from, sold property to or bought property from a shareholder, director or member of the organization, or has a shareholder or member sold his interest in the organization for profit? Yes ☐ No ☐

If "YES," attach a description of each transaction. For sales, give buyer, seller, price paid, value of the property sold and date of sale. For loans, give lender, borrower, amount borrowed, interest rate and term of loan. Attach a copy of note, if any.

Does the organization operate in such a manner that does not result in the accrual of distributable profits, the distribution of profits or the realization of any other form of private gain? Yes ☐ No ☐

Step 5: Answer these Questions About the School's Bylaws or Charter

1. Does the school use its assets in performing its educational functions or the educational functions of another educational organization? Yes ☐ No ☐
2. Do these documents direct that on the discontinuance of the school, the school's assets are to be transferred to the state of Texas, to the United States, or to an educational, religious, charitable or other similar organization that is qualified for exemption under Section 501(c)(3), Internal Revenue Code, as amended? Yes ☐ No ☐

If "YES", give the page and paragraph numbers. Page _____ Paragraph _____

Step 6: Describe the Property for Which You are Seeking an Exemption

PROPERTY TO BE EXEMPT:

- For CHARTER School, **ATTACH** a copy of your current TEA charter contract.
- **ATTACH** a copy of the charter, bylaws or other documents adopted by the organization which govern its affairs.
- **ATTACH** one Schedule A (REAL PROPERTY) form for **EACH** parcel of *real* property to be exempt.
- **ATTACH** one Schedule B (PERSONAL PROPERTY) form listing **ALL** *personal* property to be exempt.
- List only property owned by the organization.

Step 7: Read, Sign, and Date

By signing this application, you designate the property described in the attached Schedules A and B as the property against which the private school exemption may be claimed in this appraisal district.

By signing this application, you certify that the information provided in this application is true and correct to the best of your knowledge and belief.

On behalf of (name of organization)

Date

Authorized Signature

Title

Printed Name

If you make a false statement on this application, you could be found guilty of a Class A misdemeanor or a state jail felony under §37.10, Penal Code.

OTHER IMPORTANT INFORMATION

Pursuant to Tax Code §11.45, after considering this application and all relevant information, the chief appraiser may request additional information from you. You must provide the additional information within 30 days of the request or the application is denied. For good cause shown, the chief appraiser may extend the deadline for furnishing the additional information by written order for a single period not to exceed 15 days.

Exemption Application for Private School

SCHEDULE A: Description of Real Property

Account Number/s: _____

Complete one Schedule A form for **EACH** parcel of real property to be exempt.

Name of Property Owner *

Property Address

Legal Description: _____
(if known) Subdivision Block Lot OR Abst # Survey

Type of Property

Describe the primary use of this property: _____

Is this property used exclusively for school purposes? Yes ☐ No ☐

Is this property held for gain, rented or used with a view to profit? Yes ☐ No ☐

Is this property the organization's state headquarters? Yes ☐ No ☐

Is the property currently under active construction or physical preparation? Yes ☐ No ☐

If under construction, when will construction be completed? (date) _____

If under physical preparation, check which activity the organization has done (*Check all that apply*).

☐ Architectural Work

☐ Land Clearing activities

☐ Engineering Work

☐ Site Improvement work

☐ Soil Testing

☐ Environmental or land use study

Is the incomplete improvement designed and intended to be used for a qualified private school purpose? Yes ☐ No ☐

Is the land on which the incomplete improvement is located reasonably necessary for the use of the improvement for the operation of the qualified private school? Yes ☐ No ☐

List all other individuals and organizations that used this property in the past year, and give the requested information for each.

Name	Dates Used	Activity	Rent Paid, If Any

Continue on additional sheets as needed

* If property owner is a religious organization, attach a copy of the school's lease agreement.

SCHEDULE B: Description of Personal Property

Account Number/s: _____

Name of Property Owner

Is this property reasonably necessary for operation of the school? Yes ☐ No ☐

Is this property held for gain? Yes ☐ No ☐

Is this property used exclusively for school purposes? Yes ☐ No ☐

- List all tangible property to be exempt on this schedule.
- Attach all completed schedules to your application for exemption.

[illegible]

Continue on additional sheets as needed



**CHECK LIST FOR
TOTAL EXEMPTION APPLICATIONS**

The items listed below are required to process most applications for a total exemption of property taxes:

1. ATTACH a complete copy of the organization's articles of incorporation and bylaws, (attach bylaws or other governing documents if the organization is not a corporation).
2. ATTACH one Schedule A or AR (Real Property) form for EACH parcel to be exempt.
3. ATTACH one Schedule B or BR (Personal Property) form for EACH personal property account to be exempt.
4. ATTACH a narrative describing the organization's activities.
5. For newly acquired property, ATTACH a copy of the warranty deed(s) that conveys ownership of the property to the organization applying for the exemption.
6. If applying for a project that is under "active construction", ATTACH documentation showing that site work, architectural work, soil studies, or other preparation has begun, along with a date for completion.
7. Complete the application:
 - a. Specify the year(s) you are seeking an exemption.
 - b. Provide the correct mailing address to receive correspondence from the appraisal district.
 - c. Answer all application questions.
 - d. If applying for a Charitable Organization Exemption, under §11.18, the organization must perform at least **one** of the activities listed under Step 2, Question 4. You must check the appropriate box(es) for the activity performed by the organization. If the organization does not perform at least one of the activities listed then the organization may not qualify for a total exemption of property taxes.
 - e. Sign and date the application.
 - f. Attach all required documents to the application.
 - g. If applying for a Clergy Residence for a Religious Organization, under §11.20, the occupant of the clergy residence must complete the *Clergy Residence Affidavit*.