

## Part 1: What is a Property Tax Assessment (and Appeal) Consultant?

First, let us define what a basic consultant is and what they do. A consultant is simply someone who provides various professional services in a specialized field. This would include a hierarchy of purposes: providing information, giving advice, offering recommendations, and implementing solutions. **In this new field of Residential Property Tax Assessment Consultants and Appeal Representatives, all Representatives are Consultants, but not all Consultants will be Representatives.**

Secondly, what does it mean to provide real estate consulting services in property tax assessment and appeal matters? It means helping individual property owners review, evaluate, and appeal their property's assessment. Thirdly, who can legally represent property owners in assessment appeals? Unless a law states otherwise, property owners can bring in or hire whomever they like to help them while contesting property tax assessments (excluding in-court appeals). **Consultants must check state and local statutes in each jurisdiction where they plan to offer services—more discussion is in Section 2.**

A Property Tax Assessment & Appeal Consultant can provide basic consultation at little or no cost or charge a fee for more detailed services. The fee structure can be based on a flat rate, a percentage, a contingency fee, or a combination of all, as with broker compensation. Acquiring knowledge in the specialization of property tax assessments and appeals, you can become a skilled PTA-Consultant or use it to appeal your own for years to come. It is also great for helping family and friends save tax dollars by reducing “overvalued” assessments.

Though beneficial, the primary focus of this course is paid tax appeal services, including appeal reviews, reports, packages, and representation for customers and clients.

Initially, you need to determine whether a prospect is a referral source, customer, or client. Every property owner you encounter already knows, or will eventually learn of, someone looking to sell or buy a property. Therefore, every prospect is, at minimum, a referral source, so treat them with a good degree of care.

Educate real estate buyers on potential property tax implications after the purchase. Educating home buyers on post-sale assessments and appeal processes strengthens your position as a true real estate professional and keeps you top of mind.