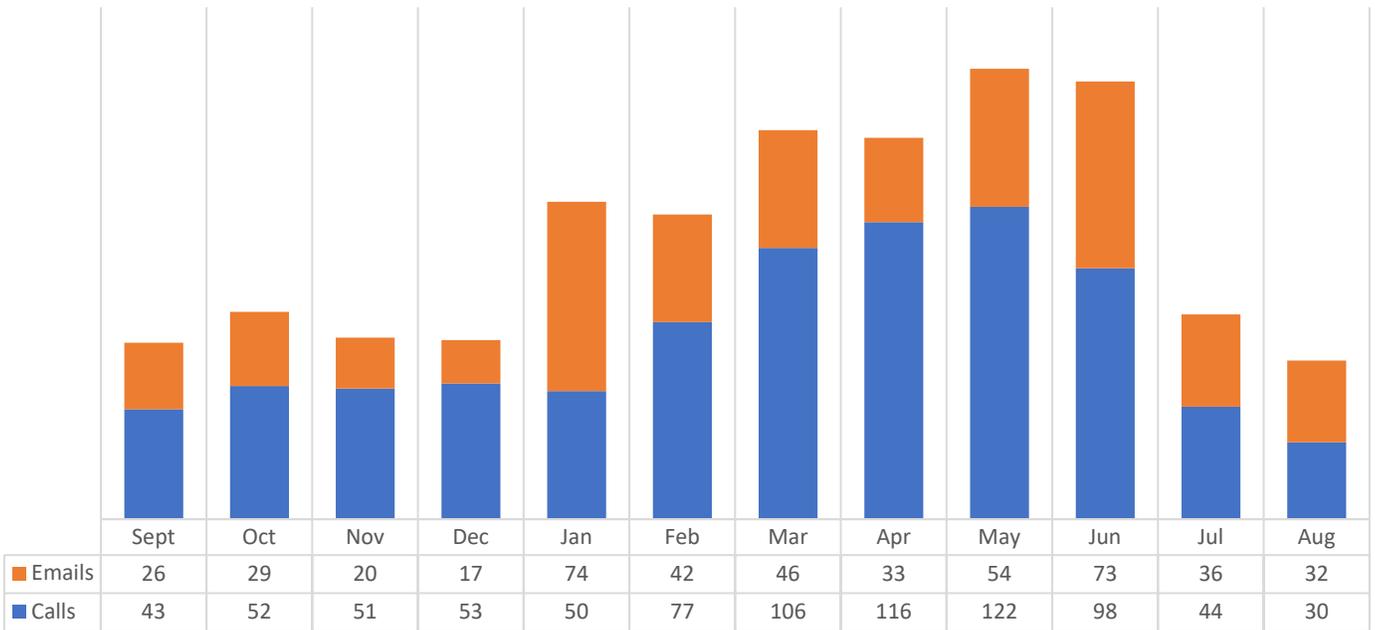


**PROPERTY TAX CONSULTANTS
CUSTOMER SERVICE CONTACTS
FISCAL YEAR 2018**



Property Tax Consultants
Advisory Council

Enforcement Division Staff Report
October 10, 2018

Case Highlight

Victor Reyes III (TDRL No. PTC20170023646)

On June 26, 2018, an Agreed Order was entered in which Respondent agreed to pay \$6,500 for performing property tax consulting services for compensation at a time when Respondent was not employed by or associated with a senior property tax consultant. Respondent filed notices of protest representing 489 properties during which time Respondent was not employed by or associated with a senior property tax consultant. Respondent also filed an Appointment of Agent form with a County Appraisal district with a forged signature of the property owner, and Respondent failed to allow the Department's investigator to examine and copy Respondent's records related to the investigation. Respondent also agreed to a one-year probated suspension of his license.

Key Statistics

Shown below are key statistics for the Property Tax Consultants program and for all TDLR programs combined through August Fiscal Year 2018.

<u>Statistic</u>	<u>PTC</u>	<u>TDLR</u>
• Number of cases opened:	16	10,585
• Number of cases resolved:	6	9,833
• Number of Agreed Orders:	1	1,295
• Total amount of penalties assessed:	\$6,500	\$3,209,055
• Total amount of penalties collected:	\$1,083	\$1,528,594

**PROPERTY TAX CONSULTANTS ADVISORY COUNCIL
OCTOBER 10TH, 2018**

PROPERTY TAX CONSULTANT STATISTICS AND TRENDS

EXAMINATIONS

(AS OF AUGUST 31ST, 2018)

FY 2018	SEP	OCT	NOV	Q1	DEC	JAN	FEB	Q2	MAR	APR	MAY	Q3	JUN	JUL	AUG	Q4	TOT
Pass	1	5	9	15	17	5	18	40	14	14	14	42	15	3	5	23	120
Fail	3	1	2	6	6	4	14	24	16	16	17	49	20	7	11	38	117
Total	4	6	11	21	23	9	32	64	30	30	31	91	35	10	16	61	237
Rate	25.0%	83.3%	81.8%	71.4%	73.9%	55.6%	56.3%	62.5%	46.7%	46.7%	45.2%	46.2%	42.9%	30.0%	31.3%	37.7%	50.6%

FY 2017	SEP	OCT	NOV	Q1	DEC	JAN	FEB	Q2	MAR	APR	MAY	Q3	JUN	JUL	AUG	Q4	TOT
Pass	6	5	6	17	11	12	9	32	25	17	16	58	8	5	5	18	125
Fail	10	5	9	24	10	7	1	18	8	14	18	40	16	5	10	31	113
Total	16	10	15	41	21	19	10	50	33	31	34	98	24	10	15	49	238
Rate	37.5%	50.0%	40.0%	41.5%	52.4%	63.2%	90.0%	64.0%	75.8%	54.8%	47.1%	59.2%	33.3%	50.0%	33.3%	36.7%	52.5%

FY 2016	SEP	OCT	NOV	Q1	DEC	JAN	FEB	Q2	MAR	APR	MAY	Q3	JUN	JUL	AUG	Q4	TOT
Pass	7	2	5	14	17	17	33	67	18	15	11	44	15	4	2	21	146
Fail	11	6	2	19	7	13	21	41	18	19	9	46	19	7	6	32	138
Total	18	8	7	33	24	30	54	108	36	34	20	90	34	11	8	53	284
Rate	38.9%	25.0%	71.4%	42.4%	70.8%	56.7%	61.1%	62.0%	50.0%	44.1%	55.0%	48.9%	44.1%	36.4%	25.0%	39.6%	51.4%

EXAMINATION PASS/FAIL RATES BY LICENSE TYPE – FY 2018
 (AS OF AUGUST 31ST, 2018)

MAR – APR – MAY					JUN – JUL – AUG				
3 RD QUARTER					4 TH QUARTER				
LICENSE TYPE	PASS	FAIL	TOTAL	RATE	LICENSE TYPE	PASS	FAIL	TOTAL	RATE
PROPERTY TAX CONSULTANT – SENIOR	7	6	13	53.85%	PROPERTY TAX CONSULTANT – SENIOR	2	6	8	25.00%
PROPERTY TAX CONSULTANT	35	43	48	44.87%	PROPERTY TAX CONSULTANT	21	32	53	39.62%
PROPERTY TAX CONSULTANT - ATTORNEY	0	0	0	0.00%	PROPERTY TAX CONSULTANT - ATTORNEY	0	0	0	0.00%
TOTAL	42	49	91	46.15%	TOTAL	23	38	61	37.70%
SEPT – OCT – NOV					DEC – JAN – FEB				
1 ST QUARTER					2 ND QUARTER				
LICENSE TYPE	PASS	FAIL	TOTAL	RATE	LICENSE TYPE	PASS	FAIL	TOTAL	RATE
PROPERTY TAX CONSULTANT – SENIOR	3	0	3	100.00%	PROPERTY TAX CONSULTANT – SENIOR	4	1	5	80.00%
PROPERTY TAX CONSULTANT	12	5	17	70.59%	PROPERTY TAX CONSULTANT	35	22	57	61.40%
PROPERTY TAX CONSULTANT - ATTORNEY	0	1	1	0.00%	PROPERTY TAX CONSULTANT - ATTORNEY	1	1	2	50.00%
TOTAL	15	6	21	71.43%	TOTAL	40	24	64	62.50%

CONTINUING EDUCATION

(AS OF AUGUST 31ST, 2018)

FY 2018	SEP	OCT	NOV	Q1	DEC	JAN	FEB	Q2	MAR	APR	MAY	Q3	JUN	JUL	AUG	Q4	TOT
COURSE APPROVALS ISSUED	2	0	3	5	1	2	6	9	4	5	5	14	1	2	4	7	35
TOTAL COURSES	36	31	32	32	33	28	33	33	33	35	38	38	37	34	35	35	35

FY 2017	SEP	OCT	NOV	Q1	DEC	JAN	FEB	Q2	MAR	APR	MAY	Q3	JUN	JUL	AUG	Q4	TOT
COURSE APPROVALS ISSUED	0	3	2	5	0	8	2	10	5	3	2	10	2	6	2	10	35
TOTAL COURSES	26	30	31	31	30	34	33	33	32	33	34	34	34	33	34	34	34

FY 2016	SEP	OCT	NOV	Q1	DEC	JAN	FEB	Q2	MAR	APR	MAY	Q3	JUN	JUL	AUG	Q4	TOT
COURSE APPROVALS ISSUED	0	1	1	2	1	4	5	10	4	0	3	7	2	5	3	10	29
TOTAL COURSES	25	24	24	24	24	24	26	26	23	23	26	26	26	27	28	28	28

Texas Department of Licensing and Regulation
Regulatory Program Management Division
Property Tax Consultants Advisory Council Meeting
October 10, 2018

Public Outreach

- Russel Taulli, as the Regulatory Program Management (RPM) Division's program specialist for the PTC program, frequently answers phone calls and emails regarding the program. Inquiries are usually about the PTC rules or the statute, registration requirements and exemptions.
- The RPM is open to opportunities for public outreach (conventions, conferences, association meetings, etc.) related to the PTC Program. Program specialists are available to speak at these events and provide information. We invite the advisory board and industry members to please let us know when an opportunity arises. Please send an email to Russ.Taulli@TDLR.Texas.Gov.



To view online electronic magazine version:

Strategic Plan: [https://issuu.com/tdlr/docs/strat_plan_layout - 6-7-18 complete](https://issuu.com/tdlr/docs/strat_plan_layout_-_6-7-18_complete)

Supplemental Schedules: https://issuu.com/tdlr/docs/supplemental_schedules_complete_6-7