



**APPLICATION FOR  
AD VALOREM TAX EXEMPTION  
FOR NEW OR EXPANDED MANUFACTURING ESTABLISHMENT**

COMPANY INFORMATION

1. Date of application: \_\_\_\_\_
2. The name of the Company is: \_\_\_\_\_
3. The principal address of the Company is:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
4. The Company is organized as a \_\_\_\_\_, under the laws of the State of \_\_\_\_\_.
5. Federal ID Number: \_\_\_\_\_
6. Louisville Metro Revenue Commission ID Number: \_\_\_\_\_

FACILITY INFORMATION

7. Location of New or Expanded Manufacturing Establishment (“Facility”):  
\_\_\_\_\_  
\_\_\_\_\_
8. Product(s) to be manufactured at Facility: \_\_\_\_\_  
\_\_\_\_\_
9. Describe the manufacturing process at the Facility: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
10. Date of commencement of construction of new or expanded Facility: \_\_\_\_\_
11. The Company qualifies as a new or expanded manufacturing establishment pursuant to L.M.C.O. §38.20 because:
  - A. \_\_\_ This is the first Facility the Company is operating in Louisville Metro.
  - B. \_\_\_ The Company operates another Facility(ies) in Louisville Metro and this is a new Facility location on a different property than its other Facility(ies).
  - C. \_\_\_ The Company operates another Facility(ies) in Louisville Metro and this is a new



- Facility located on the same property as the other Facility(ies).
- D. \_\_\_ This Facility is an expansion of the Company’s existing Facility in Louisville Metro.
- E. \_\_\_ The Company is developing a new product line in its existing Facility in Louisville Metro

**If you checked A or B above, complete Section 12 below. If you checked C, D or E above, complete Section 13 below.**

12. New Facility Location

A. The Real Property is to be purchased \_\_\_ leased \_\_\_.

B. Provide the following information about the Real Property:

- (1) The size of the Real Property is: \_\_\_\_\_
- (2) The tax block, and lot of the Real Property is: \_\_\_\_\_
- (3) If the Real Property is being purchased:
- (a) Name of the Buyer is: \_\_\_\_\_
  - (b) Name of the Seller is: \_\_\_\_\_
  - (c) Date purchased: \_\_\_\_\_
  - (d) The purchase price is : \$\_\_\_\_\_ (attach copy of deed, option or purchase agreement)
- (4) If the Real Property is to be leased: (attach copy of lease or term sheet)
- (a) Name of the Lessor: \_\_\_\_\_
  - (b) Name of the Lessee: \_\_\_\_\_
  - (c) Amount of annual rent: \$\_\_\_\_\_
  - (d) Term of Lease: \_\_\_\_\_
  - (e) Does lease require tenant to pay property taxes? \_\_Yes\_\_ No If yes, describe whether the tenant is paying all of the property taxes on the Real Property or a percentage of the total amount, and if a percentage, how that percentage is calculated: \_\_\_\_\_
  - (f) Current assessed value of Real Property: \$\_\_\_\_\_ (attach copy of most recent tax bill)

C. Are there Improvements located on the Real Property \_\_ Yes \_\_ No; If yes, describe the nature of the Improvements:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



D. Will new Improvements be constructed upon the Real Property \_\_\_ Yes \_\_\_ No; If yes, please describe the nature of the Improvements to be constructed and the estimated cost of construction:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

E. Will all of the Real Property and Improvements be used to manufacture the products described in line 8 \_\_\_ Yes \_\_\_ No; If not, describe what non-manufacturing activities will occur: \_\_\_\_\_

And what percentage of the Real Property and Improvements will be used for non-manufacturing activities \_\_\_%?

13. Expansion of Existing Facility or New Product Line

A. The Real Property is owned \_\_\_\_\_ leased \_\_\_\_\_ by the Company

If leased, provide name and address of the Lessor and attach a copy of lease:

\_\_\_\_\_  
\_\_\_\_\_

If leased, does lease require tenant to pay property taxes? \_\_\_Yes \_\_\_ No If yes, describe whether the tenant is paying all of the property taxes on the Real Property or a percentage of the total amount, and if a percentage, how that percentage is calculated: \_\_\_\_\_

B. Provide the following information regarding the Real Property:

(1) Address: \_\_\_\_\_

(2) Tax Block \_\_\_\_\_ Lot \_\_\_\_\_

(3) Acreage: \_\_\_\_\_

(4) Describe current Improvements: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

(5) Current taxable assessment of Real Property (attach copy of most recent tax bill)  
\$ \_\_\_\_\_.

C. Is the expansion of the existing Facility:

(1) A new building? \_\_\_ If yes, describe and estimate cost of construction:

\_\_\_\_\_  
\_\_\_\_\_

(2) A renovation or enlargement of an existing Facility? \_\_\_ If yes, describe and estimate cost of construction: \_\_\_\_\_




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(3) A new product line in an existing Facility?  Yes  No; If yes, describe the new product, the nature of renovations to the existing Facility, the equipment to be installed and the estimated costs, and the manufacturing process:

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D. Will all of the expansion be used to manufacture the products described in Section 8?  Yes  No; If no, describe what other non-manufacturing activities will occur within the expansion area:

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And what percentage of the expansion will be used for non-manufacturing activities \_\_\_\_\_ %

PERSONAL PROPERTY TO BE EXEMPTED

14. Will taxable Personal Property, other than manufacturing equipment, be acquired for the Facility?  Yes  No; If yes, estimate the cost of such Personal Property \$ \_\_\_\_\_ (attach an itemized listing of such Personal Property)

15. Summary of Property Exempted

Value of Real Property	\$ _____
Value of Improvements	\$ _____
Value of Personal Property	\$ _____
Total estimated value of property sought to be exempted	\$ _____

16. Wage Information

A. If the Company has existing Facilities in Louisville Metro, provide the following employment information:

Current annual payroll \$ \_\_\_\_\_  
 Number of current employees \_\_\_\_\_  
 Current high wage rate \$ \_\_\_\_\_  
 Current low wage rate \$ \_\_\_\_\_



Current median wage rate \$ \_\_\_\_\_

B. New Employment resulting from new or expanded Facility:

Increase in payroll \$ \_\_\_\_\_

Number of new employees \_\_\_\_\_

New jobs high wage rate \$ \_\_\_\_\_

New jobs low wage rate \$ \_\_\_\_\_

New jobs median wage rate \$ \_\_\_\_\_

CERTIFICATION

I, \_\_\_\_\_, \_\_\_\_\_ of \_\_\_\_\_

\_\_\_\_\_ do certify that all of the information furnished above is true and correct as of the date of execution of this certification and further that the Facility is a New Manufacturing Establishment as defined in the Section 38.21 of the Louisville Metro Codified Ordinances, that it is being located in Louisville Metro in good faith with the intention of being continued permanently or for a period of no less than five years.

By: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

COMMONWEALTH OF KENTUCKY )  
 ) ss  
COUNTY OF JEFFERSON )

Subscribed and sworn to before me by \_\_\_\_\_, 201\_\_\_\_.

My Commission expires: \_\_\_\_\_.

\_\_\_\_\_  
Notary Public, Kentucky State at Large