



The Brennan Group | *Strategic Tax & Cost Management*

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A BRENNAN GROUP CASE STUDY

Give a Little, Get a Little

A few years ago, one of The Brennan Group's clients – a large Midwestern cement company – came up against a small town assessor, who lacked appraising expertise and arbitrarily assessed personal property and real estate taxes. The Brennan Group identified a very large potential reduction – over 50%. No matter what was presented in the appeal process, the assessor wouldn't budge. No local reduction was granted, so The Brennan Group took the appeal to the next level, the State Tax Commission.

The Brennan Group commissioned an independent appraisal, which justified a much lower valued appraisal and the State Tax Commission was very favorable to the reduction requested. However, the client itself was concerned about the impact such a huge reduction in tax income would have on their small community, perhaps leaving the school district in a difficult financial position. Accordingly, The Brennan Group negotiated a reduction of approximately 20%, which the client felt was fair to itself and to the community.

The Brennan Group listens to its clients. In this case, it would have been easy to secure an even larger savings for the client, but that would have been detrimental to the community and, ultimately, to the client. The Brennan Group keeps the client's needs and concerns at the forefront of any negotiation.

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