

DECLARATORY RESOLUTION NO. R-27-14

**A DECLARATORY RESOLUTION designating an
"Economic Revitalization Area" under I.C. 6-1.1-12.1 for
property commonly known as unassigned addresses,
4800 Block of Tyrone Road, Fort Wayne, Indiana 46809
(MediService Leasing, LLC for Life, Inc.)**

WHEREAS, Petitioner has duly filed its petition dated March 24, 2014 to have the following described property designated and declared an "Economic Revitalization Area" under Sections 153.13-153.24 of the Municipal Code of the City of Fort Wayne, Indiana, and I.C. 6-1.1-12.1, to wit:

Attached hereto as "Exhibit A" as if a part herein;

and

WHEREAS, said project will create 26 part-time, permanent jobs for a total new, annual payroll of \$1,224,054, with the average new annual job salary being \$47,079 and retain 34 full-time and 131 part-time, permanent jobs for a total current annual payroll of \$1,937,429, with the average current, annual job salary being \$11,742; and

WHEREAS, the total estimated project cost is \$500,000; and

WHEREAS, it appears the said petition should be processed to final determination in accordance with the provisions of said Division 6.

NOW, THEREFORE, BE IT RESOLVED BY THE COMMON COUNCIL OF THE CITY OF FORT WAYNE, INDIANA:

SECTION 1. That, subject to the requirements of Section 6, below, the property hereinabove described is hereby designated and declared an "Economic Revitalization Area" under I.C. 6-1.1-12.1. Said designation shall begin upon the effective date of the Confirming Resolution referred to in Section 6 of this Resolution and shall terminate on December 31, 2016, unless otherwise automatically extended in five year increments per I.C. 6-1.1-12.1-9.

SECTION 2. That, upon adoption of the Resolution:

Said Resolution shall be filed with the Allen County Assessor;

Said Resolution shall be referred to the Committee on Finance requesting a recommendation from said committee concerning the advisability of designating the above area an "Economic Revitalization Area";

Common Council shall publish notice in accordance with I.C. 6-1.1-12.1-2.5 and I.C. 5-3-1 of the adoption and substance of this resolution and setting this designation as an "Economic Revitalization Area" for public hearing.

1 **SECTION 3.** That, said designation of the hereinabove described property as an
2 "Economic Revitalization Area" shall apply to a deduction of the assessed value of real
3 estate.

4 **SECTION 4.** That, the estimate of the number of individuals that will be employed
5 or whose employment will be retained and the estimate of the annual salaries of those
6 individuals and the estimate of the value of redevelopment or rehabilitation, all contained in
7 Petitioner's Statement of Benefits, are reasonable and are benefits that can be reasonably
8 expected to result from the proposed described redevelopment or rehabilitation.

9 **SECTION 5.** That, the current year approximate tax rates for taxing units within
10 the City would be:

11 If the proposed development does not occur, the approximate current year tax
12 rates for this site would be \$3.3124/\$100.

13 If the proposed development does occur and no deduction is granted, the
14 approximate current year tax rate for the site would be \$3.3124/\$100 (the
15 change would be negligible).

16 If the proposed development occurs and a deduction percentage of fifty percent
17 (50%) is assumed, the approximate current year tax rate for the site would be
18 \$3.3124/\$100 (the change would be negligible).

19 **SECTION 6.** That, this Resolution shall be subject to being confirmed, modified
20 and confirmed, or rescinded after public hearing and receipt by Common Council of the
21 above described recommendations and resolution, if applicable.

22 **SECTION 7.** That, pursuant to I.C. 6-1.1-12.1, it is hereby determined that the
23 deduction from the assessed value of the real property shall be for a period of five years.

24 **SECTION 8.** The deduction schedule from the assessed value of real estate
25 pursuant to I.C. 6-1.1-12.1-17 shall look like this:

Year of Deduction	Percentage
1	100%
2	80%
3	60%
4	40%
5	20%

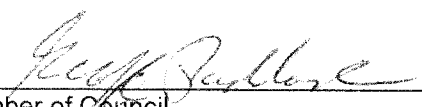
26 **SECTION 9.** That, the benefits described in the Petitioner's Statement of Benefits
27 can be reasonably expected to result from the project and are sufficient to justify the
28 applicable deductions.

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SECTION 10. That, the taxpayer is non-delinquent on any and all property tax due to jurisdictions within Allen County, Indiana.

SECTION 11. That, pursuant to I.C. 6-1.1-12.1-12 et al, any property owner that has received a deduction under section 3 or 4.5 of this chapter may be required to repay the deduction amount as determined by the county auditor in accordance with section 12 of said chapter if the property owner ceases operations at the facility for which the deduction was granted and if the Common Council finds that the property owner obtained the deduction by intentionally providing false information concerning the property owner's plans to continue operation at the facility.

SECTION 12. That, this Resolution shall be in full force and effect from and after its passage and any and all necessary approval by the Mayor.



Member of Council

APPROVED AS TO FORM AND LEGALITY


Carol Helton, City Attorney



APR 21 2014

gmc

**ECONOMIC REVITALIZATION AREA APPLICATION
CITY OF FORT WAYNE, INDIANA**

APPLICATION IS FOR: (Check appropriate box(es))

- Real Estate Improvements
- Personal Property Improvements
- Vacant Commercial or Industrial Building

Total cost of real estate improvements:	250,000.00
Total cost of manufacturing equipment improvements:	0.
Total cost of research and development equipment improvements:	0.
Total cost of logistical distribution equipment improvements:	0.
Total cost of information technology equipment improvements:	0.
TOTAL OF ABOVE IMPROVEMENTS:	250,000.00

GENERAL INFORMATION

Real property taxpayer's name: MEDISERVICE LEASING, LLC

Personal property taxpayer's name: _____

Telephone number: (260) 602-9574

Address listed on tax bill: 11718 Woodstream Ridge CT., Fort Wayne, IN, 46845

Name of company to be designated, if applicable: MEDISERVICE LEASING, LLC

Year company was established: 2014

Address of property to be designated: 4800 block of Tyrone Ave, Ft. Wayne, IN

Real estate property identification number: 02-12-21-186-006-003-74

Contact person name: Jennifer Russell

Contact person telephone number: (269) 753-4016 Contact person Email: russell11023@gmail.com

Contact person address: 413 Brandis Place, Marshall, MI 49068

List company officer and/or principal operating personnel

NAME	TITLE	ADDRESS	PHONE NUMBER
Andrew Offerle	Co-Owner	11718 Woodstream Ridge Ct, Ft. Wayne	(260)602-9574
Brandon Russell	Co-Owner	413 Brandis Pl., Marshall, MI	(269) 753-5377
Jennifer Russell	Administrative Assistant	413 Brandis Pl., Marshall, MI	(269) 753-4016

List all persons or firms having ownership interest in the applicant business and the percentage each holds:

NAME	PERCENTAGE
Dr Andrew Offerle, MD	50%
Dr. Brandon Russell, D.O	50%

- Yes No Are any elected officials shareholders or holders of any debt obligation of the applicant or operating business? If yes, who? (name/title) _____
- Yes No Is the property for which you are requesting ERA designation totally within the corporate limits of the City of Fort Wayne?
- Yes No Do you plan to request state or local assistance to finance public improvements?
- Yes No Is the property for which you are requesting ERA designation located in an Economic Development Target Area (EDTA)? (see attached map for current areas)
- Yes No Does the company's business include a retail component? If yes, answer the following questions:
 What percentage of floor space will be utilized for retail activities? _____
 What percentage of sales is made to the ultimate customer? _____
 What percentage of sales will be from service calls? _____
- What is the percentage of clients/customers served that are located outside of Allen County? 0%
- What is the company's primary North American Industrial Classification Code (NAICs)? 531110
- Describe the nature of the company's business, product, and/or service: Residential Development

Dollar amount of annual sales for the last three years:

Year	Annual Sales
2012	0
2013	0
2014	60,000 *projected figure based on rent from LIFE, INC.

List the company's three largest customers, their locations and amount of annual gross sales:

Customer Name	City/State	Annual Gross Sales
LIFE, INC	Ft. Wayne, IN	4.3 million

List the company's three largest material suppliers, their locations and amount of annual purchases:

Supplier Name	City/State	Annual Gross Purchases
NA		

List the company's top three competitors:

Competitor Name	City/State
NA	

Describe the product or service to be produced or offered at the project site: Residential (rental) units to be operated by LIFE, INC for Developmentally Disabled Adults

In order to be considered an Economic Revitalization Area (ERA), the area must be within the corporate limits of the City of Fort Wayne and must have become undesirable for, or impossible of, normal development and occupancy because of a lack of development, cessation of growth, deterioration of improvements or character of occupancy, age, obsolescence, substandard buildings, or other factors which have impaired values or prevent a normal development of property or use of property. It also includes any area where a facility or group of facilities that are technologically, economically, or energy obsolete is located and where the obsolescence may lead to a decline in employment and tax revenues.

How does the property for which you are requesting designation meet the above definition of an ERA?

The parcels to be purchased for development by MEDISERVICE LEASING are located in
~~undesirable~~
location for traditional residential development. Furthermore the property has been
for sale for a period greater than five years.

REAL PROPERTY INFORMATION

Complete this section of the application if you are requesting a deduction from assessed value for real property improvements.

Describe any structure(s) that is/are currently on the property: none (vacant land)

Describe the condition of the structure(s) listed above: none

Describe the improvements to be made to the property to be designated for tax phase-in purposes: New construction, 4 bedroom 1500 sq.ft. attached condominium

Projected construction start (month/year): May, 2014

Projected construction completion (month/year): September, 2016

Yes No Will construction result in Leadership in Energy and Environmental Design (LEED) certification by the U.S. Green Building Council?

Yes No Will construction use techniques to minimize impact on combined sewer overflows? (i.e. rain gardens, bio swales, etc.)

PERSONAL PROPERTY INFORMATION

Complete this section of the application if you are requesting a deduction from assessed value of new manufacturing, research and development, logistical distribution or information technology equipment.

List below the equipment for which you are seeking an economic revitalization area designation.

Manufacturing equipment must be used in the direct production, manufacture, fabrication, assembly, extraction, mining, processing, refining, or finishing of other tangible personal property at the site to be designated. Research and development equipment consists of laboratory equipment, research and development equipment, computers and computer software, telecommunications equipment or testing equipment used in research and development activities devoted directly and exclusively to experimental or laboratory research and development for new products, new uses of existing products, or improving or testing existing products at the site to be designated. Logistical distribution equipment consists of racking equipment, scanning or coding equipment, separators, conveyors, fork lifts or lifting equipment, transitional moving equipment, packaging equipment, sorting and picking equipment, software for technology used in logistical distribution, is used for the storage or distribution of goods, services, or information. Information technology equipment consists of equipment, including software used in the fields of information processing, office automation, telecommunication facilities and networks, informatics, network administration, software development and fiber optics: (use additional sheets, if necessary)

Yes No Has the above equipment for which you are seeking a designation, ever before been used for any purpose in Indiana? If yes, was the equipment acquired at an arms length transaction from an entity not affiliated with the applicant? Yes No

Yes No Will the equipment be leased?

Date first piece of equipment will be purchased (month/year): _____

Date last piece of equipment will be installed (month/year): _____

Please provide the depreciation schedule term for equipment under consideration for personal property tax phase-in:

ELIGIBLE VACANT BUILDING INFORMATION

Complete this section of the application if you are requesting a deduction from the current assessed value of a vacant building

Yes No Has the building for which you are seeking designation for tax phase-in been unoccupied for at least one year? Please provide evidence of occupation. (i.e. certificate of occupancy, paid utility receipts, executed lease agreements)

Describe any structure(s) that is/are currently on the property: _____

Describe the condition of the structure(s) listed above: _____

Projected occupancy date (month/year): _____

Describe the efforts of the owner or previous owner in regards to selling, leasing or renting the eligible vacant building during the period the eligible vacant building was unoccupied including how much the building was offered for sale, lease, or rent by the owner or a previous owner during the period the eligible vacant building was unoccupied.

PUBLIC BENEFIT INFORMATION

EMPLOYMENT INFORMATION FOR FACILITY TO BE DESIGNATED

ESTIMATE OF EMPLOYEES AND PAYROLL FOR FORT WAYNE
FACILITY REQUESTING ECONOMIC REVITALIZATION AREA DESIGNATION

Please be specific on job descriptions. When listing the occupation codes, please avoid using the "Major Occupational Groupings" (i.e. 11-000, 13-000, 15-000, etc.) which are more general in nature. Instead, use specific occupation codes (i.e. 11-1021, 13-1081, 15-2041 etc) for each created and retained job. To fill out information on occupation and occupation code, use data available through Occupation Employment Statistics for Fort Wayne http://www.bls.gov/oes/current/oes_23060.htm

Current Full-Time Employment

Occupation	Occupation Code	Number of Jobs	Total Payroll
Social and Human	21-1093	36	38,236.80/bi-weekly
Service Assistants			

Retained Full-Time Employment

Occupation	Occupation Code	Number of Jobs	Total Payroll
Social and Human	21-1093	34	36,196.80/bi-weekly
Service Assistants			

Additional Full-Time Employment

Occupation	Occupation Code	Number of Jobs	Total Payroll
Social and Human	21-1093	0	
Service Assistants			

PUBLIC BENEFIT INFORMATION

Current Part-Time or Temporary Jobs

Occupation	Occupation Code	Number of Jobs	Total Payroll
Social and Human Service Assistants	21-1093	131	38,319.70 bi-weekly

Retained Part-Time or Temporary Jobs

Occupation	Occupation Code	Number of Jobs	Total Payroll
Social and Human Service Assistants	21-1093	131	38,319.70 bi-weekly

Additional Part-Time or Temporary Jobs

Occupation	Occupation Code	Number of Jobs	Total Payroll
Social and Human Service Assistants	21-1093	26	47,079 bi-weekly

Check the boxes below if the existing jobs and the jobs to be created will provide the listed benefits:

- | | | |
|------------------------------------------------|----------------------------------------------------|-----------------------------------------------|
| <input type="checkbox"/> Pension Plan | <input type="checkbox"/> Major Medical Plan | <input type="checkbox"/> Disability Insurance |
| <input type="checkbox"/> Tuition Reimbursement | <input checked="" type="checkbox"/> Life Insurance | <input type="checkbox"/> Dental Insurance |

List any benefits not mentioned above: vacation/holiday

When will you reach the levels of employment shown above? (month/year): 06/2016

REQUIRED ATTACHMENTS

The following must be attached to the application.

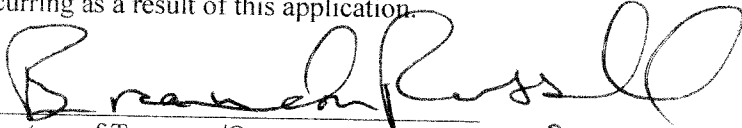
1. **Statement of Benefits Form(s) (first page/front side completed)**
2. **Full legal description of property and a plat map identifying the property boundaries. (Property tax bill legal descriptions are not sufficient.) Should be marked as Exhibit A.**
3. **Check for non-refundable application fee made payable to the City of Fort Wayne.**

ERA filing fee (either real or personal property improvements)	.1% of total project cost not to exceed \$500
ERA filing fee (both real and personal property improvements)	.1% of total project cost not to exceed \$750
ERA filing fee (vacant commercial or industrial building)	\$500
ERA filing fee in an EDTA	\$100
Amendment to extend designation period	\$300
Waiver of non compliance with ERA filing	\$500 + ERA filing fee
4. **Owner's Certificate (if applicant is not the owner of property to be designated) Should be marked as Exhibit B if applicable.**

CERTIFICATION

I, as the legal taxpayer and/or owner, hereby certify that all information and representations made on this application and its attached exhibits are true and complete and that neither an Improvement Location Permit nor a Structural Permit has been filed for construction of improvements, nor has any manufacturing, research and development, logistical distribution or information technology equipment which is a part of this application been purchased and installed as of the date of filing of this application. I also certify that the taxpayer is not delinquent on any and all property tax due to taxing jurisdictions within Allen County, Indiana. I understand that any incorrect information on this application may result in a rescission of any tax phase-ins which I may receive.

I understand that I must file a correctly completed Compliance with Statement of Benefits Form (CF-1/Real Property for real property improvements and CF-1/PP for personal property improvements) and the Public Benefit Annual Update with the City of Fort Wayne Community Development Division in each year in which I receive a deduction. Further the CF-1/PP form must be filed with the county assessor and the CF-1/Real Property must be filed with the county auditor. Failure to file the CF-1 form with these agencies may result in a rescission of any tax phase-in occurring as a result of this application.



Signature of Taxpayer/Owner

Brandon Russell owner

Printed Name and Title of Applicant

4/17/2014

Date



APR 21 2014

**ECONOMIC REVITALIZATION AREA APPLICATION
CITY OF FORT WAYNE, INDIANA**

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Personal property taxpayer's name: _____

Telephone number: (260) 602-9574

Address listed on tax bill: 11718 Woodstream Ridge CT., Fort Wayne, IN, 46845

Name of company to be designated, if applicable: MEDISERVICE LEASING, LLC

Year company was established: 2014

Address of property to be designated: 4800 block of Tyrone Ave, Ft.Wayne, IN

Real estate property identification number: 02-12-21-187-001.000-074

Contact person name: Jennifer Russell

Contact person telephone number: (269) 753-4016 Contact person Email: russell11023@gmail.com

Contact person address: 413 Brandis Place, Marshall, MI 49068

List company officer and/or principal operating personnel

NAME	TITLE	ADDRESS	PHONE NUMBER
Andrew Offerle	Co-Owner	11718 Woodstream Ridge Ct, Ft.Wayne	(260)602-9574
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NAME	PERCENTAGE
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- Yes No Is the property for which you are requesting ERA designation totally within the corporate limits of the City of Fort Wayne?
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- Yes No Does the company's business include a retail component? If yes, answer the following questions:
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- What is the company's primary North American Industrial Classification Code (NAICs)? 531110
- Describe the nature of the company's business, product, and/or service: Residential Development

Dollar amount of annual sales for the last three years:

Year	Annual Sales
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2013	0
2014	60,000 *projected

figure based on rent from LIFE, INC.

List the company's three largest customers, their locations and amount of annual gross sales:

Customer Name	City/State	Annual Gross Sales
LIFE, INC	Ft. Wayne, IN	4.3 million

List the company's three largest material suppliers, their locations and amount of annual purchases:

Supplier Name	City/State	Annual Gross Purchases
NA		

List the company's top three competitors:

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Describe the product or service to be produced or offered at the project site: Residential (rental) units to be operated by LIFE, INC for Developmentally Disabled Adults

In order to be considered an Economic Revitalization Area (ERA), the area must be within the corporate limits of the City of Fort Wayne and must have become undesirable for, or impossible of, normal development and occupancy because of a lack of development, cessation of growth, deterioration of improvements or character of occupancy, age, obsolescence, substandard buildings, or other factors which have impaired values or prevent a normal development of property or use of property. It also includes any area where a facility or group of facilities that are technologically, economically, or energy obsolete is located and where the obsolescence may lead to a decline in employment and tax revenues.

How does the property for which you are requesting designation meet the above definition of an ERA?

The parcels to be purchased for development by MEDISERVICE LEASING are located in undesirable location for traditional residential development. Furthermore the property has been for sale for a period greater than five years.

REAL PROPERTY INFORMATION

Complete this section of the application if you are requesting a deduction from assessed value for real property improvements.

Describe any structure(s) that is/are currently on the property: none (vacant land)

Describe the condition of the structure(s) listed above: none

Describe the improvements to be made to the property to be designated for tax phase-in purposes: New construction, 4 bedroom 1500 sq.ft. attached condominium

Projected construction start (month/year): May, 2014

Projected construction completion (month/year): September, 2016

Yes No Will construction result in Leadership in Energy and Environmental Design (LEED) certification by the U.S. Green Building Council?

Yes No Will construction use techniques to minimize impact on combined sewer overflows? (i.e. rain gardens, bio swales, etc.)

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Yes No Will the equipment be leased?

Date first piece of equipment will be purchased (month/year): _____

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Please provide the depreciation schedule term for equipment under consideration for personal property tax phase-in:

ELIGIBLE VACANT BUILDING INFORMATION

Complete this section of the application if you are requesting a deduction from the current assessed value of a vacant building

Yes No Has the building for which you are seeking designation for tax phase-in been unoccupied for at least one year? Please provide evidence of occupation. (i.e. certificate of occupancy, paid utility receipts, executed lease agreements)

Describe any structure(s) that is/are currently on the property: _____

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Projected occupancy date (month/year): _____

Describe the efforts of the owner or previous owner in regards to selling, leasing or renting the eligible vacant building during the period the eligible vacant building was unoccupied including how much the building was offered for sale, lease, or rent by the owner or a previous owner during the period the eligible vacant building was unoccupied.

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http://www.bls.gov/oes/current/oes_23060.htm

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Service Assistants			

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| <input type="checkbox"/> Tuition Reimbursement | <input checked="" type="checkbox"/> Life Insurance | <input type="checkbox"/> Dental Insurance |

List any benefits not mentioned above: vacation/holiday

When will you reach the levels of employment shown above? (month/year): 06/2016

REQUIRED ATTACHMENTS

The following must be attached to the application.

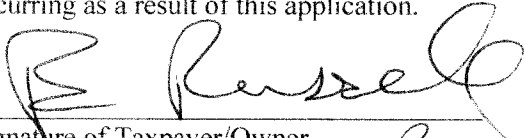
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ERA filing fee in an EDTA	\$100
Amendment to extend designation period	\$300
Waiver of non compliance with ERA filing	\$500 + ERA filing fee
4. **Owner's Certificate (if applicant is not the owner of property to be designated) Should be marked as Exhibit B if applicable.**

CERTIFICATION

I, as the legal taxpayer and/or owner, hereby certify that all information and representations made on this application and its attached exhibits are true and complete and that neither an Improvement Location Permit nor a Structural Permit has been filed for construction of improvements, nor has any manufacturing, research and development, logistical distribution or information technology equipment which is a part of this application been purchased and installed as of the date of filing of this application. I also certify that the taxpayer is not delinquent on any and all property tax due to taxing jurisdictions within Allen County, Indiana. I understand that any incorrect information on this application may result in a rescission of any tax phase-ins which I may receive.

I understand that I must file a correctly completed Compliance with Statement of Benefits Form (CF-1/Real Property for real property improvements and CF-1/PP for personal property improvements) and the Public Benefit Annual Update with the City of Fort Wayne Community Development Division in each year in which I receive a deduction. Further the CF-1/PP form must be filed with the county assessor and the CF-1/Real Property must be filed with the county auditor. Failure to file the CF-1 form with these agencies may result in a rescission of any tax phase-in occurring as a result of this application.



Signature of Taxpayer/Owner

Brandola Russell owner

Printed Name and Title of Applicant

4/17/2014

Date



**STATEMENT OF BENEFITS
REAL ESTATE IMPROVEMENTS**

State Form 51767 (R5 / 12-13)
Prescribed by the Department of Local Government Finance

CITY OF FT WAYNE

APR 21 2014 *ZWC*

COMMUNITY DEVL.

20 ___ PAY 20 ___
FORM SB-1 / Real Property
PRIVACY NOTICE
Any information concerning the cost of the property and specific salaries paid to individual employees by the property owner is confidential per IC 6-1.1-12.1-5.1.

This statement is being completed for real property that qualifies under the following Indiana Code (check one box):

- Redevelopment or rehabilitation of real estate improvements (IC 6-1.1-12.1-4)
- Residentially distressed area (IC 6-1.1-12.1-4.1)

INSTRUCTIONS:

1. This statement must be submitted to the body designating the Economic Revitalization Area prior to the public hearing if the designating body requires information from the applicant in making its decision about whether to designate an Economic Revitalization Area. Otherwise, this statement must be submitted to the designating body **BEFORE** the redevelopment or rehabilitation of real property for which the person wishes to claim a deduction.
2. The statement of benefits form must be submitted to the designating body and the area designated an economic revitalization area before the initiation of the redevelopment or rehabilitation for which the person desires to claim a deduction.
3. To obtain a deduction, a Form 322/RE must be filed with the County Auditor before May 10 in the year in which the addition to assessed valuation is made or not later than thirty (30) days after the assessment notice is mailed to the property owner if it was mailed after April 10. A property owner who failed to file a deduction application within the prescribed deadline may file an application between March 1 and May 10 of a subsequent year.
4. A property owner who files for the deduction must provide the County Auditor and designating body with a Form CF-1/Real Property. The Form CF-1/Real Property should be attached to the Form 322/RE when the deduction is first claimed and then updated annually for each year the deduction is applicable. IC 6-1.1-12.1-5.1(b)
5. For a Form SB-1/Real Property that is approved after June 30, 2013, the designating body is required to establish an abatement schedule for each deduction allowed. For a Form SB-1/Real Property that is approved prior to July 1, 2013, the abatement schedule approved by the designating body remains in effect. IC 6-1.1-12.1-17

SECTION 1 TAXPAYER INFORMATION

Name of taxpayer MEDISERVICE LEASING, LLC.		
Address of taxpayer (number and street, city, state, and ZIP code) 11718 Woodstream Ridge Ct., Ft. Wayne, IN 46845		
Name of contact person Jennifer Russell	Telephone number (269) 753-4016	E-mail address russell1023@gmail.com

SECTION 2 LOCATION AND DESCRIPTION OF PROPOSED PROJECT

Name of designating body Ft. Wayne Common Council	Resolution number
Location of property 4800 Block Tyrone Ave, Ft. Wayne	County Allen
Description of real property improvements, redevelopment, or rehabilitation (use additional sheets if necessary) New construction, 4 bedroom 1500 Sq.Ft attached condominium, 2 units	DLGF taxing district number
	Estimated start date (month, day, year) 05/01/2014
	Estimated completion date (month, day, year) 09/01/2016

SECTION 3 ESTIMATE OF EMPLOYEES AND SALARIES AS RESULT OF PROPOSED PROJECT

Current number	Salaries	Number retained	Salaries	Number additional	Salaries
167.00	\$76,556.50	165.00	\$74,516.50	26.00	\$8,759.30

SECTION 4 ESTIMATED TOTAL COST AND VALUE OF PROPOSED PROJECT

	REAL ESTATE IMPROVEMENTS	
	COST	ASSESSED VALUE
Current values		
Plus estimated values of proposed project	500,000.00	1,000,000.00
Less values of any property being replaced		
Net estimated values upon completion of project		1,250,000.00

SECTION 5 WASTE CONVERTED AND OTHER BENEFITS PROMISED BY THE TAXPAYER

Estimated solid waste converted (pounds) _____	Estimated hazardous waste converted (pounds) _____
------------------------------------------------	----------------------------------------------------

Other benefits

SECTION 6 TAXPAYER CERTIFICATION

I hereby certify that the representations in this statement are true.

Signature of authorized representative <i>Jennifer Russell</i>	Date signed (month, day, year) 04/03/2014
Printed name of authorized representative Jennifer Russell	Title Administrative Assistant

FOR USE OF THE DESIGNATING BODY

We find that the applicant meets the general standards in the resolution adopted or to be adopted by this body. Said resolution, passed or to be passed under IC 6-1.1-12.1, provides for the following limitations:

- A. The designated area has been limited to a period of time not to exceed _____ calendar years* (see below). The date this designation expires is December 31, 2016.
- B. The type of deduction that is allowed in the designated area is limited to:
 1. Redevelopment or rehabilitation of real estate improvements Yes No
 2. Residentially distressed areas Yes No
- C. The amount of the deduction applicable is limited to \$ unlimited.
- D. Other limitations or conditions (specify) _____
- E. Number of years allowed: Year 1 Year 2 Year 3 Year 4 Year 5 (* see below)
 Year 6 Year 7 Year 8 Year 9 Year 10
- F. For a statement of benefits approved after June 30, 2013, did this designating body adopt an abatement schedule per IC 6-1.1-12.1-17?
 Yes No
 If yes, attach a copy of the abatement schedule to this form.
 If no, the designating body is required to establish an abatement schedule before the deduction can be determined.

We have also reviewed the information contained in the statement of benefits and find that the estimates and expectations are reasonable and have determined that the totality of benefits is sufficient to justify the deduction described above.

Approved (signature and title of authorized member of designating body) <i>Martin A. Bender</i>	Telephone number <i>(260) 427-1221</i>	Date signed (month, day, year) <i>5-13-14</i>
Printed name of authorized member of designating body <i>Martin A. Bender</i>	Name of designating body <i>Common Council</i>	
Attested by (signature and title of attester) <i>Sandra E. Kennedy</i>	Printed name of attester <i>Sandra E. Kennedy</i>	

* If the designating body limits the time period during which an area is an economic revitalization area, that limitation does not limit the length of time a taxpayer is entitled to receive a deduction to a number of years that is less than the number of years designated under IC 6-1.1-12.1-17.

- A. For residentially distressed areas where the Form SB-1/Real Property was approved prior to July 1, 2013, the deductions established in IC 6-1.1-12.1-4-1 remain in effect. The deduction period may not exceed five (5) years. For a Form SB-1/Real Property that is approved after June 30, 2013, the designating body is required to establish an abatement schedule for each deduction allowed. The deduction period may not exceed ten (10) years. (See IC 6-1.1-12.1-17 below.)
- B. For the redevelopment or rehabilitation of real property where the Form SB-1/Real Property was approved prior to July 1, 2013, the abatement schedule approved by the designating body remains in effect. For a Form SB-1/Real Property that is approved after June 30, 2013, the designating body is required to establish an abatement schedule for each deduction allowed. (See IC 6-1.1-12.1-17 below.)

IC 6-1.1-12.1-17

Abatement schedules

Sec. 17. (a) A designating body may provide to a business that is established in or relocated to a revitalization area and that receives a deduction under section 4 or 4.5 of this chapter an abatement schedule based on the following factors:

- (1) The total amount of the taxpayer's investment in real and personal property.
- (2) The number of new full-time equivalent jobs created.
- (3) The average wage of the new employees compared to the state minimum wage.
- (4) The infrastructure requirements for the taxpayer's investment.

(b) This subsection applies to a statement of benefits approved after June 30, 2013. A designating body shall establish an abatement schedule for each deduction allowed under this chapter. An abatement schedule must specify the percentage amount of the deduction for each year of the deduction. An abatement schedule may not exceed ten (10) years.

(c) An abatement schedule approved for a particular taxpayer before July 1, 2013, remains in effect until the abatement schedule expires under the terms of the resolution approving the taxpayer's statement of benefits.

EXHIBIT A

EXHIBIT 'A'

Part of the lands conveyed to Tyrone Villa Apartments, LLC, in Recorder's Document #2007064043 as situated in the Northwest Quarter of Section 21, Township 30 North, Range 12 East, in Allen County, Indiana, more particularly described as follows:

Commencing at the point of intersection of the West right-of-way line of the Norfolk Southern Railroad and the South line of the said Northwest Quarter, being also the Northeast corner of Lot Numbered 16 in Tyrone Addition, as recorded in Plat Record 17, Page 32, in the Office of the Recorder of Allen County, Indiana and referenced by a 3/4 inch diameter rebar 2.6 feet East; thence North 89 degrees 39 minutes 00 seconds West (recorded bearing and is utilized as the basis for all bearings relative this description) along the South line of said Northwest Quarter, 246.10 feet to a 5/8 inch diameter rebar with an orange identification cap stamped "ANDERSON FIRM #29A" on the West right-of-way line of Tyrone Road per Document #200077787; thence North 00 degrees 18 minutes 00 seconds West along said West right-of-way line, 173.50 feet to a 5/8 inch diameter rebar with an orange identification cap stamped "ANDERSON FIRM #29A" monumenting the *POINT OF BEGINNING* for the parcel herein described; thence North 89 degrees 39 minutes 00 seconds West, a distance of 145.74 feet to a 5/8 inch diameter rebar with an orange identification cap stamped "ANDERSON FIRM #29A" (noted as an Anderson rebar in the remainder of this description) on the east line of the Michael & Gail Bernhardt parcel, Document #92-32950; thence North 00 degrees 28 minutes 10 seconds West on said east line and the east line of the Gerald & Sharon Toor parcel, Document #206070220; a distance of 73.49 feet to an Anderson rebar monumenting the northeast corner of said Toor parcel, Document #206070220; thence South 89 degrees 39 minutes 00 seconds East on a northerly line of said Tyrone Villa Apartments, LLC parcel, 43.25 feet to an Anderson rebar; thence North 00 degrees 28 minutes 10 seconds West on a westerly line of said Tyrone Villa Apartments, LLC parcel, 168.95 feet to an Anderson rebar; thence North 89 degrees 05 minutes 46 seconds West on a southerly line of said Tyrone Villa Apartments, LLC parcel, 42.20 feet to an Anderson rebar monumenting the Southeast corner of the Tennison parcel, Document #200067173; thence North 00 degrees 28 minutes 10 seconds West along the East line of said Tennison parcel, 92.64 feet to an Anderson rebar on the center line of the Trentman Drain, being also the South line of a Sakowicz parcel, Document #204062295; thence North 84 degrees 54 minutes 14 seconds East along said South line, being within the banks of said Trentman Drain, 401.99 feet to an Anderson rebar on the West right-of-way line of said Norfolk Southern Railroad; thence South 00 degrees 39 minutes 39 seconds West along said West right-of-way line, 294.48 feet to an Anderson rebar; thence South 89 degrees 42 minutes 00 seconds West on a southerly line of said Tyrone Villa Apartments, LLC parcel, 200.09 feet to an Anderson rebar on the East right-of-way line of said Tyrone Road; thence continuing Northerly along said Tyrone Road right-of-way line being a regular curve to the left and having a radius of 50.00 feet, a distance of 235.62 feet (chord bearing of North 45 degrees 18 minutes 00 seconds West and chord distance of 70.71 feet) to an Anderson rebar monumenting the point of tangency of said curve; thence South 00 degrees 18 minutes 00 seconds East along the West right-of-way line of said Tyrone Road, 118.50 feet to the true point of beginning, containing 2.408 acres of land, more or less.

EXHIBIT A

EXHIBIT A

A part of the north half of Section 21, Township 30 North, Range 12 East, Allen County, Indiana, more particularly described as follows:

Beginning at the intersection of the East/West center line of said sections and the west line of the old L.E. & W. RR, iron pin set (set), said point also being the northeast corner of Lot 16 of Tyrone Addition to Fort Wayne; thence North 89 degrees 00 minutes West along the center line of said Section 21, a distance of 246.10 feet to an IPS; thence North 0 degrees 21 minutes East a distance of 290.00 to an IPS; thence along a tangent curve, to the right, having a radius of 50.00 feet, a delta of 270 degrees, and an arc length of 235.62 feet to an IPS; thence South 89 degrees 39 minutes East a distance of 196.66 feet to the west line of said RR (IPS); thence South 0 degrees 29 minutes West along said west line, a distance of 240.00 feet to the point of beginning, containing 1.55 acres, more or less.

9 1 2 2 4 7 6

EXHIBIT A

EXHIBIT B

Legal Description-Ingress/Egress Easement

Description of real estate;

A part of the north half of Section 21, Township 30 North, Range 12 East, Allen County, Indiana, more particularly described as follows:

Commencing at the intersection of the East/West center line of said section and the west line of the old L.E. & W. RR, iron pin set (set), said point also being the northeast corner of Lot 16 of Tyrone Addition to Fort Wayne; thence North 89 degrees 00 minutes West along the center line of said Section 21, a distance of 196.10 feet to the true point of beginning; thence continuing west along the center line of said Section 21, a distance of 50 feet to an IPS; thence North 0 degrees 21 minutes East, a distance of 290.00 to an IPS; thence along a tangent curve, to the right, having a radius of 50.00 feet, a delta of 270 degrees, and an arc length of 235.62 feet to an IPS; thence South 00 degrees 21 seconds East a distance of 240 feet to the point of beginning.

9 1 2 2 4 7 6

EXHIBIT A

EXHIBIT C - RESTRICTIVE COVENANTS

1. The subject real estate shall be used only for residential building purposes.
2. No building shall be built on any tract of real estate having a ground floor area upon foundation exclusive of open porches or garage, of less than 1100 square feet for a one story dwelling, nor less than 800 square feet for a dwelling of more than one story.
3. No building shall be located on any lot nearer to the front lot line than 25 feet provided that all buildings must be located in conformity with the zoning code of the City of Fort Wayne.
4. No dwelling shall be erected or placed on any tract having a width of less than 60 feet at the minimum building set back line nor shall any dwelling be erected or placed on any tract having an area of less than 10,000 square feet.
5. No noxious or offensive activity shall be carried on upon any tract nor shall anything be done thereon which may be or may become an annoyance or nuisance to the neighborhood.
6. All buildings shall be constructed in a substantial and good workmanlike manner and of new materials.

9 1 2 2 4 7 6

DIGEST SHEET

TITLE OF ORDINANCE: **Declaratory Resolution**

DEPARTMENT REQUESTING ORDINANCE: **Community Development Division**

SYNOPSIS OF ORDINANCE: **Mediservice Leasing, LLC is requesting the designation of an Economic Revitalization Area for real property improvements in the amount of \$500,000. Mediservice Leasing, LLC will construct two duplexes with each four bedroom unit containing approximately 1,500 square feet that will house developmentally disabled adults.**

EFFECT OF PASSAGE: **In order to continue to serve disabled adults, Life, Inc. will be expanding its services for residential care with the development of housing on currently vacant land. 26 part-time jobs will be created as a result of the project**

EFFECT OF NON-PASSAGE: **Potential loss of residential development on vacant land and 26 part-time jobs**

MONEY INVOLVED (DIRECT COSTS, EXPENDITURES, SAVINGS): **No expenditures of public funds required.**

ASSIGNED TO COMMITTEE (PRESIDENT): **Russell Jehl and John Crawford**

MEMORANDUM



TO: City Council
FROM: Elissa McGauley, Economic Development Specialist
DATE: May 8, 2014
RE: Request for designation by MediService Leasing, LLC as an ERA for real property improvements for Life, Inc.

BACKGROUND

PROJECT ADDRESS:	4800 Block of Tyrone Road	PROJECT LOCATED WITHIN:	Not Applicable
PROJECT COST:	\$ 500,000	COUNCILMANIC DISTRICT:	4

COMPANY PRODUCT OR SERVICE:	Life, Inc. provides services for developmentally disabled adults.
PROJECT DESCRIPTION:	MediService Leasing will construct two duplexes with each four bedroom unit containing approximately 1,500 square feet that will house developmentally disabled adults

CREATED		RETAINED	
JOBS CREATED (FULL-TIME):	0	JOBS RETAINED (FULL-TIME):	34
JOBS CREATED (PART-TIME):	26	JOBS RETAINED (PART-TIME):	131
TOTAL NEW PAYROLL:	\$ 1,224,054	TOTAL RETAINED PAYROLL:	\$ 1,937,429
AVERAGE SALARY (FULL-TIME NEW):	\$	AVERAGE SALARY (FULL-TIME RETAINED):	\$ 27,680

COMMUNITY BENEFIT REVIEW

Yes No N/A

Project will encourage vacant or under-utilized land appropriate for commercial or industrial use?

Explain: Property to be developed is currently vacant.

Yes No N/A

Real estate to be designated is consistent with land use policies of the City of Fort Wayne?

Explain: Property to be designated is zoned RP, a planned residential zoning classification. Use of property is consistent with the land use policies of the City of Fort Wayne.

Yes No N/A

Project encourages the improvement or replacement of a deteriorated or obsolete structure?

Yes No N/A

Project encourages the improvement or replacement of obsolete manufacturing and/or research and development and/or information technology and/or logistical distribution equipment?

Yes No N/A

Project will result in significant conversion of solid waste or hazardous waste into energy or other useful products?

Yes No N/A

Project encourages preservation of an historically or architecturally significant structure?

Yes No N/A

Construction will result in Leadership in Energy and Environmental Design (LEED) certification by the U.S. Green Building Council?

Yes No N/A

Construction will use techniques to minimize impact on combined sewer overflows? (i.e. rain gardens, bio swales, etc.)

Yes No N/A

ERA designation induces employment opportunities for Fort Wayne area residents?
Explain: 26 part-time jobs will be created as a result of the project

Yes No N/A

Taxpayer is NOT delinquent on any or all property tax due to any taxing jurisdiction within Allen County.

POLICY

Per the policy of the City of Fort Wayne, the following guidelines apply to this project:

- 1. The period of deduction for real property is five years.

Under Fort Wayne Common Council's tax abatement policies and procedures, MediService Leasing, LLC is eligible for a five deduction on real property improvements. Attached is a spreadsheet that shows how the application scored under the review system as well as a calculation of property tax savings with the five year deduction.

COMMENTS

Signed:

Elissa McQuay
Economic Development Specialist

Real Property Abatements

Tax Abatement Review System

	Points Possible	Points Awarded
INVESTMENT (30 points possible)		
Total new investment in real property (new structures and/or rehabilitation)		
Over \$1,000,000	10	
\$500,000 to \$999,999	8	8
\$100,000 to \$499,999	6	
Under \$100,000	4	
<hr/>		
Investment per employee (both jobs created and retained)		
\$35,000 or more	10	
\$18,500 to \$34,999	8	
\$6,250 to \$18,499	6	
\$1,250 to \$6,249	4	4
less than \$1,250	2	
<hr/>		
Estimated local income taxes generated from jobs retained		
\$80,000 or more	5	
\$30,000 to \$79,999	4	
\$10,000 to \$29,999	3	3
\$5,000 to \$9,999	2	
less than \$5,000	1	
<hr/>		
Estimated local income taxes generated from jobs created (Double points for start-up)		
\$30,000 or more	5	
\$10,000 to \$29,999	4	4
\$5,000 to \$9,999	3	
\$3,000 to \$4,999	2	
less than \$3,000	1	
<hr/>		
ECONOMIC BASE (20 points possible)		
Location Quotient in designated Occupation Code (use majority Occupation Code of all created and retained jobs)		
Greater than 1.0	5	
<hr/>		
Estimated Percent of Business done outside Allen County		
Greater than 75%	15	
50% to 74%	10	
25% to 49%	5	
<hr/>		
JOBS (20 points possible)		
Total number of permanent jobs retained		
Over 250	10	
100 to 249	8	8
50 to 99	6	
25 to 49	4	
10 to 24	2	
1 to 9	1	
<hr/>		
Total number of permanent jobs created (Double for start-up)		
Over 100	10	
50-99	8	
25-49	6	6
10-24	4	
1 to 9	2	
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WAGES (20 points possible)		
Median salary of the jobs created and/or retained		
Over \$45,000	20	
\$40,000 to \$44,999	16	
\$35,000 to \$39,999	12	
\$30,000 to 34,999	8	8
\$25,000 to \$29,999	4	
under \$25,000	0	
<hr/>		
BENEFITS (10 points possible)		
Major Medical Plan	7	0
Pension, Tuition Reimbursement, Life Insurance, Dental Insurance, Disability Insurance,	3	3
<hr/>		
SUSTAINABILITY		
Construction uses green building techniques (ie LEED Certification)	5	0
Construction uses techniques to minimize impact on Combined Sewer Overflows (CSOs)	5	5
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Total	49	

Length of Abatement

- 20 to 39 points - 3 year abatement
- 40 to 59 points - 5 year abatement
- 60 to 69 points - 7 year abatement
- 70 to 100 points - 10 year abatement

* If Average annual salary of the full-time jobs created by listed occupation is 10% or greater than the average salary for Allen County using current occupational employment statistics, then the applicant is eligible for an alternate deduction schedule.

Real Property Deduction Schedules	Alternative Deduction Real Property Schedules
10 year	10 Year
Year 1: 100%	Year 1: 100%
Year 2: 95%	Year 2: 100%
Year 3: 80%	Year 3: 100%
Year 4: 65%	Year 4: 100%
Year 5: 50%	Year 5: 100%
Year 6: 40%	Year 6: 90%
Year 7: 30%	Year 7: 80%
Year 8: 20%	Year 8: 65%
Year 9: 10%	Year 9: 50%
Year 10: 5%	Year 10: 40%
Year 11: 0%	
7 year	7 Year
Year 1: 100%	Year 1: 100%
Year 2: 85%	Year 2: 100%
Year 3: 71%	Year 3: 100%
Year 4: 57%	Year 4: 100%
Year 5: 43%	Year 5: 100%
Year 6: 29%	Year 6: 71%
Year 7: 14%	Year 7: 43%
Year 8: 0%	
5 year	
Year 1: 100%	
Year 2: 80%	
Year 3: 60%	
Year 4: 40%	
Year 5: 20%	
Year 6: 0%	
3 year	
Year 1: 100%	
Year 2: 66%	
Year 3: 33%	
Year 4: 0%	

**FORT WAYNE COMMUNITY DEVELOPMENT DIVISION
TAX ABATEMENT - ESTIMATE OF SAVINGS**

REAL PROPERTY TAX ABATEMENT - 5 yr Schedule

Year	Cash Value	True Tax Value	Assessed Value	Tax Abatement %	Tax Paid %	Deduction	Taxable AV	Tax Rate	Tax Paid	Tax Saved		
1	\$500,000	\$350,000	\$350,000	100%	0%	\$350,000	\$0	0.033124	\$0	\$11,593		
2	\$500,000	\$350,000	\$350,000	80%	20%	\$280,000	\$70,000	0.033124	\$2,319	\$9,275		
3	\$500,000	\$350,000	\$350,000	60%	40%	\$210,000	\$140,000	0.033124	\$4,637	\$6,956		
4	\$500,000	\$350,000	\$350,000	40%	60%	\$140,000	\$210,000	0.033124	\$6,956	\$4,637		
5	\$500,000	\$350,000	\$350,000	20%	80%	\$70,000	\$280,000	0.033124	\$9,275	\$2,319		
6	\$500,000	\$350,000	\$350,000	0%	100%	\$0	\$350,000	0.033124	\$11,593	\$0		
7	\$500,000	\$350,000	\$350,000	0%	100%	\$0	\$350,000	0.033124	\$11,593	\$0		
8	\$500,000	\$350,000	\$350,000	0%	100%	\$0	\$350,000	0.033124	\$11,593	\$0		
9	\$500,000	\$350,000	\$350,000	0%	100%	\$0	\$350,000	0.033124	\$11,593	\$0		
10	\$500,000	\$350,000	\$350,000	0%	100%	\$0	\$350,000	0.033124	\$11,593	\$0		
11	\$500,000	\$350,000	\$350,000	0%	100%	\$0	\$350,000	0.033124	\$11,593	\$0		
TOTAL TAX SAVED REAL PROPERTY										(10 yrs on 5 yr deduction)	\$34,780	
TOTAL TAX PAID REAL PROPERTY										(10 yrs on 5 yr deduction)		\$81,154

NOTE: Above calculations assume a constant tax rate over the abatement period. Time value of money is not considered.

Public Hearing Date, if applicable _____

Read the first time in full and on motion by Councilman Russell Jehl
Read the second time by title and referred to the Finance Committee
Committee. Read the third time in full and on motion by Councilman
Jehl, placed on passage by the following vote:

	<u>AYES</u>	<u>NAYS</u>	<u>ABSTAINED</u>	<u>ABSENT</u>
<u>TOTAL VOTES</u>	<u>8</u>	_____	_____	<u>1</u>
BENDER	_____	_____	_____	<u>✓</u>
CRAWFORD	<u>✓</u>	_____	_____	_____
DIDIER	<u>✓</u>	_____	_____	_____
HARPER	<u>✓</u>	_____	_____	_____
HINES	<u>✓</u>	_____	_____	_____
JEHL	<u>✓</u>	_____	_____	_____
PADDOCK	<u>✓</u>	_____	_____	_____
SHOAFF	<u>✓</u>	_____	_____	_____
SMITH	<u>✓</u>	_____	_____	_____

DATED: 5-13-14 Sandra E. Kennedy
SANDRA E. KENNEDY, CITY CLERK

Passed and adopted by the Common Council of the City of Fort Wayne, Indiana, as
(ANNEXATION) (APPROPRIATION) (GENERAL) (SPECIAL) (ZONING) ORDINANCE
(RESOLUTION) NO. R-29-14 on the _____ day of _____
_____, 2014

Sandra E. Kennedy ATTEST:
SANDRA E. KENNEDY,
CITY CLERK

Joseph A. Bender
PRESIDING OFFICER

Presented by me to the Mayor of the City of Fort Wayne, Indiana, on the 14th day
of May, 2014, at the hour of 4:00 o'clock PM. E.S.T.

Sandra E. Kennedy
SANDRA E. KENNEDY, CITY CLERK

Approved and signed by me this 15th day of MAY

2014, at the hour of 2:00 o'clock PM. E.S.T.

Thomas C. Henry
THOMAS C. HENRY, MAYOR

BILL NO. R-14-05-07

REPORT OF COMMITTEE ON FINANCE

MAY 13, 2014

*Russell Jehl, Chair
John Crawford, Co, Chair
All Council Members*

A DECLARATORY RESOLUTION designating an "Economic Revitalization Area" under I.C. 6-1.1-12.1 for property commonly known as unassigned addresses, 4800 block of Tyrone Road, Fort Wayne, Indiana 46809 (MediService Leasing, LLC for Life, Inc.). **COMMITTEE ON FINANCE HAVE HAD SAID Ordinance under consideration and beg leave to report back to the Common Council that said ordinance**

DO PASS

DO NOT PASS

ABSTAIN

NO REC

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**SANDRA E. KENNEDY
CITY CLERK**