

# HISTORIC AND DESIGN REVIEW COMMISSION

June 21, 2017

**HDRC CASE NO:** 2017-301  
**ADDRESS:** 401 NORTH DR  
**LEGAL DESCRIPTION:** NCB 7059 BLK 8 LOT 11  
**ZONING:** R-6 H  
**CITY COUNCIL DIST.:** 7  
**DISTRICT:** Monticello Park Historic District  
**APPLICANT:** Mark Carmona/Top Drawer Property Solutions  
**OWNER:** Mark Carmona/Top Drawer Property Solutions  
**TYPE OF WORK:** Tax Verification  
**REQUEST:**

The applicant is requesting Historic Tax Verification for the property at 401 North Dr.

## APPLICABLE CITATIONS:

UDC Section 35-618. Tax Exemption Qualifications:

(a) Assessed Valuation. In accordance with the provisions of this article, a building, site, or structure which meets the definition of a historically significant site in need of tax relief to encourage preservation and which is substantially rehabilitated and/or restored as certified by the historic and design review commission and approved by the city tax assessor-collector, shall have an assessed value for ad valorem taxation as follows regardless of ownership during the granted time period:

(1) A residential property shall have the assessed value for ad valorem taxation for a period of ten (10) tax years equal to the assessed value prior to preservation.

(b) Applicability. This exemption shall begin on the first day of the first tax year after verification of completion of the preservation required for certification; provided the building shall comply with the applicable zoning regulations for its use and location.

(c) Application. Application for a historic structure preservation tax exemption pursuant to this division is to be filed with the office of historic preservation. The historic preservation officer shall be the agent of the city for the purposes of administering this division provided that the historic preservation officer request a recommendation from the historic and design review commission. Each application shall be signed and sworn to by the owner of the property and shall:

(1) State the legal description of the property proposed for certification;

(2) Include an affidavit by the owner describing the historic significance of the structure in need of tax relief;

(3) Include a final complete set of plans for the historic structure's restoration or rehabilitation;

(4) Include a statement of costs for the restoration or rehabilitation work;

(5) Include a projection of the estimated construction, time and predicted completion date of the historic restoration or rehabilitation;

(6) Authorize the members of the historic and design review commission, the city tax assessor-collector and city officials to visit and inspect the property proposed for certification and the records and books of the owners as necessary to certify that the property in question is in substantial need of restoration or rehabilitation;

(7) Include a detailed statement of the proposed use for the property; and

(8) Provide any additional information to the historic and design review commission which the owner deems relevant or useful such as the history of the structure or access to the structure by the public.

Each application shall contain sufficient documentation confirming or supporting the information submitted therein.

(e) Verification of Completion. Upon completion of the restoration and rehabilitation, together with a fee as specified in Appendix "C" of this chapter, the owner, who may not be the same as at the time of application, shall submit a sworn statement of completion acknowledging that the historically significant site in need of tax relief to encourage preservation has been substantially rehabilitated or restored as certified by the historic and design review commission. The historic and design review commission, upon receipt of the sworn statement of completion, but no later than thirty (30) days thereafter, shall make an investigation of the property and shall recommend either approval or disapproval of the fact that the property has been substantially completed as required for certification. If the historic and design review commission recommends that it has not been substantially completed as so required, then the certified applicant may be required by

the historic preservation officer to complete the restoration or rehabilitation in order to secure the tax exemption provided herein. If the verification of completion is favorable, the historic and design review commission shall recommend approval and the historic preservation office may notify the tax assessor-collector in writing of compliance. Thereafter, the tax assessor-collector shall provide the property with the historic tax exemption.

(f) Historic Preservation Tax Exemptions.

(1) Historic Preservation Tax Exemption for Residences in Need of Substantial Repair. In accordance with the provisions of this chapter, a historically significant residential building, which meets both the definitions of a historically significant site in need of tax relief to encourage preservation and of a residential property in Appendix "A" of this chapter, and is either individually designated or is located within the boundaries of a locally designated historic district which is substantially rehabilitated and is approved by the chief appraiser of the Bexar County Appraisal District, shall have an assessed value for ad valorem taxation as follows:

A. A residential property shall have no assessed value for ad valorem taxation for a period of five (5) tax years after verification, as defined in Appendix "A" to this chapter. Thereafter, the exempt property shall be reappraised at current market value and assessed at a fifty (50) percent rate for an additional consecutive five-year period.

B. This exemption shall begin on the first day of the first tax year after verification of completion of the substantial rehabilitation by the historic and design review commission, provided compliance with subsection (b) of this section.

(g) Eligibility.

(1) The tax exemption options outlined in subsection (f), above, will remain in effect unless terminated by designation status being removed pursuant to subsection 35-606(g) of this article.

## **FINDINGS:**

- a. The primary structure located at 401 North Dr is a 2-story single family home constructed in the Monterey style. The home features a stone façade on the first floor, a composition shingle hipped roof, a second story balcony, and an attached garage. The home is a contributing structure within the Monticello Park Historic District. The applicant is requesting Historic Tax Verification. The property received Historic Tax Certification on January 18, 2017.
- b. The scope of work consists of repairs to windows, siding, electrical, plumbing, stone cleaning, exterior painting, kitchen and bathroom upgrades, drywall, new HVAC, and garage door replacement.
- c. The requirements for Historic Tax Verification outlined in UDC Section 35-618 have been met and the applicant has provided evidence to that effect to the Historic Preservation Officer including photographs and an itemized list of costs.

## **RECOMMENDATION:**

Staff recommends approval as submitted based on findings a through c.

## **CASE MANAGER:**

Stephanie Phillips



**Flex Viewer**

**Powered by ArcGIS Server**

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# Top Drawer Property Solutions

## PROFIT AND LOSS

January 1, 2016 - June 1, 2017

	NORTH 401	TOTAL
<b>INCOME</b>		
<b>Total Income</b>		<b>\$0.00</b>
<b>GROSS PROFIT</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>EXPENSES</b>		
General & Administrative Costs		\$0.00
Bank Service Charges	156.52	\$156.52
Supplies		\$0.00
Shop	8.63	\$8.63
<b>Total Supplies</b>	<b>8.63</b>	<b>\$8.63</b>
<b>Total General &amp; Administrative Costs</b>	<b>165.15</b>	<b>\$165.15</b>
Property Expenses		\$0.00
Pre-Rehab Costs		\$0.00
Drawings- Architectural etc	6,041.00	\$6,041.00
Dumpsters/Cleanout	2,125.00	\$2,125.00
Insurance	2,277.37	\$2,277.37
<b>Total Pre-Rehab Costs</b>	<b>10,443.37</b>	<b>\$10,443.37</b>
Rehab Costs		\$0.00
Appliances & Fixtures	8,875.36	\$8,875.36
Bldg. Materials	22,284.34	\$22,284.34
Contract Labor	41,433.70	\$41,433.70
Electrical	9,024.40	\$9,024.40
Flooring	13,070.23	\$13,070.23
Hardware	142.46	\$142.46
HVAC	12,600.00	\$12,600.00
Interior Work	185.78	\$185.78
Labor	13,518.32	\$13,518.32
Landscaping/Fencing	395.27	\$395.27
Lumber	411.16	\$411.16
Painting	3,837.44	\$3,837.44
Plumbing	6,050.50	\$6,050.50
Supplies	2,376.72	\$2,376.72
Utilities	1,094.87	\$1,094.87
Windows & Exterior Doors	1,194.66	\$1,194.66
<b>Total Rehab Costs</b>	<b>136,495.21</b>	<b>\$136,495.21</b>
<b>Total Property Expenses</b>	<b>146,938.58</b>	<b>\$146,938.58</b>
Unapplied Cash Bill Payment Expense	12,180.54	\$12,180.54
Uncategorized Expense	58.48	\$58.48
<b>Total Expenses</b>	<b>\$159,342.75</b>	<b>\$159,342.75</b>
<b>NET OPERATING INCOME</b>	<b>\$ -159,342.75</b>	<b>\$ -159,342.75</b>
<b>NET INCOME</b>	<b>\$ -159,342.75</b>	<b>\$ -159,342.75</b>











































