



Personal Property Tax – California Audits and Appeals

Protecting Your Bottom Line

If you pay tax on personal property, there may be a significant and often unrealized opportunity to minimize your tax liability. The typical approach to personal property audits is to support past filings and avoid additional taxes. Often, little time and resources are devoted to strategic cost-saving opportunities.

Understanding the Issues

Ryan takes a unique approach to property tax valuation through audits and appeals. Through tested methodologies, our professionals evaluate internal company records and public data to identify real and personal property tax refund opportunities. Our approach is proven in all California counties and especially successful in Silicon Valley and San Francisco Bay Area counties.

The Ryan Advantage

Regardless of how you currently address your property tax liabilities, Ryan is poised to conduct an analysis of past and future tax savings. Our team includes more than 80 property tax professionals located across six California offices, dedicated to thoroughly understanding our clients' assets, locations, and ownership positions, as well as the unique procedures utilized by different jurisdictions within California. Ryan provides the resources and support to help our clients manage California Audits and Appeals.

**"I am impressed with Ryan's team of tax professionals.
I recommend them to everyone in my tax network."**

– Tax Specialist, Fortune 1000 Retail Corporation

Ryan can ease the challenges associated with property tax audits and appeals and increase efficiencies to ensure risk is minimized and savings are realized retrospectively and prospectively. In fact, our successes are our clients' successes. Let us show you how Ryan can be your trusted advisor.



CASE STUDY

Client Issue: An opportunity was identified while reviewing property tax audit escapes for a client's cold storage warehouse property. Ultimately, the issue resulted in full recovery of the escapes, additional refunds, and permanent reductions to future assessments.

Approach and Solution: Ryan conducted reverse property tax audits to recover all potential property tax refunds. We worked with assessors to correct audits, ensure changes were made permanent, and secure all tax refunds with interest.

Results: Our client received more than **\$750,000 in past refunds** and permanent reductions to future year property taxes by \$100,000 per year.



CASE STUDY

Client Issue: While reviewing records for a new Silicon Valley property tax audit client in the cyber security industry, Ryan determined a real property ownership change created a refund and savings opportunity for past and future property taxes.

Approach and Solution: Ryan reviewed asset records, leases, and public records to recover all potential property tax refunds and worked with assessors to secure assessment reductions and property tax refunds.

Results: Our client received more than **\$2 million in past refunds** and permanent reductions to future year property taxes by \$500,000 per year.

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Award-Winning Tax Services

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