



APPEALS AND LITIGATION MANAGEMENT: CORPORATE PERSPECTIVE AND CHALLENGES

Wednesday, March 27, 2019
Prologis Offices
6250 North River Road, Suite 1100
Rosemont, (Chicago) Illinois 60018

PREAMBLE

There are various management strategies when dealing with property assessment appeals. The challenges when dealing with appeals include selecting professional and legal advisors, deciding which properties to appeal, handling delays and efficiently managing the process. This workshop will feature experienced corporate property tax managers and representatives from the IPTI Corporate Advisory Committee who will share their experiences and strategies and cover how corporate managers can meet the challenges they are faced with in the appeal process. The “when, why’s and how” to effectively manage these challenges, including the utilization of technology will be discussed.

AGENDA

Time	Topic	Presenter/Panelists
9:30 am	Workshop Objectives	Jerry Grad, IPTI Marc Sances, Prologis
9:40 am	Session 1: Corporate Strategies <ul style="list-style-type: none"> • Current practices • Challenges: What works and what doesn't • In-house management and outsourcing • Legal and valuation strategy • Budgeting for individual cases and allocation prioritization of resources 	Brad Dunn, TJX Jerry Aucoin, Wal-Mart Brigit DuBois, Amazon
10:40 am	Break	
11:00 am	Session 2: Selecting Valuation and Legal Experts <ul style="list-style-type: none"> • Current strategies • Best practice protocols for selection and interaction with outside representatives and experts • Corporate expectations • Objective selection criteria • Creating written guidelines for external professionals 	Paul Dooley, KIMCO Kevin Scott, FiatChrysler David Wilkes, Huff, Wilkes Fred Nicely, COST
12:15 pm	Lunch	
1:00 pm	Session 3: Appeal or Not To Appeal? <ul style="list-style-type: none"> • Identifying cost reduction opportunities • Analysis of return for particular use: Do high value issues always produce high value returns? • Leveraging Technology • Current strategies: experience sharing 	Anna Pelts, Walgreen Marc Sances, Prologis Mordechai Katzman, RSI Phillip Glenwright, Shell UK
2:15 pm	Session 4: Litigation <ul style="list-style-type: none"> • Alternative dispute resolution options • Role and responsibilities of the parties • Confidentiality issues in property tax appeals • Tips and experience sharing 	David Wilkes, Huff Wilkes Kevin Scott, FiatChrysler Karl Bartholomew and Wade Phillips, Shell Oil Co.
3:25 pm	Discussion	All participants
3:45 pm	Workshop Concludes	



International Property Tax Institute

CHALLENGES DEALING WITH APPEALS THE CORPORATE PERSPECTIVE

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FEES, REGISTRATION AND HOTEL INFORMATION

Workshop Fee: \$95.00 US

The workshop is open to **corporate representatives only**.

Fee includes material, breaks and lunch.

Click [Register Now Button](#)



HOTEL INFORMATION

The following hotels are close to the venue. Please contact the hotel of your choice. IPTI is not responsible for hotel accommodation or booking.

Chicago Marriott Suite O'Hare
6155 North River Road
Rosemont, Ill 60018
T. 1-847-696-4400



Hampton Inn & Suites—Rosemont
9480 North River Road
Rosemont, Ill 60018
T . 1-866-238-42189

Co-sponsored by:



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