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Gathering data and filing returns for clients' personal property tax poses many challenges.

Nov. 01, 2022



[View the Archived Webinar](#)

This webinar was held on Friday, December 9, 2022.

Sponsor: Avalara

Duration: 1 Hour

Gathering data and filing returns for clients' personal property tax poses many challenges. Clients must prepare, print, and mail returns to local governments in as many as thirty-eight states in the US alone. Organizing hundreds of returns for clients can be daunting. In this webinar, we will review the steps to file your clients' returns and offer tips on turning this into a valuable service in your practice.

[View this recorded webinar](#) and learn:

- Overview of property tax compliance.
- Strategies to collect your clients' data, organize and load tax data into your property tax system.
- Details include making crucial decisions on taxability, depreciation life selection, and cost index selection.

Program level: Basic (no prerequisites required).

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Carl Hoemke is an entrepreneur in the property tax software and finance industries. He is the founder of CrowdReason and CorrelationAdvisors, companies acquired by Avalara in 2021. He is an executive with over thirty years of developing tools to help ease property tax compliance burdens and expertise in ensuring fair tax assessments.

Mr. Hoemke designs, leads, and manages teams for various enterprise and mid-market SaaS-based property tax applications for Avalara, Inc. These projects include TotalPropertyTax, an enterprise-level web-based property tax reporting, value tracking, and bill payment system, and MetaTasker, a SaaS-based workflow automation application for semi-structured documents (i.e., governmental notices, bills, etc.),

Formerly Mr. Hoemke was a Managing Director at Duff & Phelps and Standard & Poor's and a Partner at Ernst & Young. Mr. Hoemke started his career as an Industrial and Utility Appraiser at Taylor County Assessor's office in Abilene, Texas.



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Transformation group, focusing primarily on process, data management and technology efficiencies. Her team engages in the development of client tax solutions related to data automation and analytics.

Kelly has more than 28 years of tax experience, including 18 years in public accounting and 10 years in the corporate tax department of a large SEC filer. While in corporate, she was a leader in operations for state/local income, state tax provision and property tax functions. She also practiced for more than 13 years in the multistate tax practices at two Big4 firms, where she focused on state income tax planning and implementation of restructurings for large multistate corporations.

Kelly has deep experience in enterprise data platform and tax technology implementations and has served as a lead on numerous tax process improvement initiatives, including enterprise data platform and tax technology implementations for functions across tax.



Gail Perry is the editor-in-chief of CPA Practice Advisor. A veteran of accounting journalism, she also speaks at many accounting events,

trade shows, and webinars. Gail is the author of over 30 books

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is a former computer applications instructor at the Indiana CPA
Society. Gail is a member of the AICPA's PFS Credential Committee.

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