



51st Annual  
Wichita Property Tax Conference  
July 23 – July 27, 2023

Technology Solutions in Property  
Tax Compliance & Assessments

*Wednesday, July 26<sup>th</sup>*

Panelists

Carl Hoemke  
Avalara Property Tax

Mary Anne Maples  
CSC Global (PTMS)

Shaun Black  
Ryan (Tax.com)

**Moderator:** Joe Bolian  
Taxography, Inc.

## Bio – Carl Hoemke

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**Carl Hoemke** is currently a Vice President and General Manager of Property Tax at Avalara, Inc. Mr. Hoemke specializes in valuing businesses, tangible, and intangible assets. Mr. Hoemke has handled issues involving the valuation for financial reporting, fairness opinions, bankruptcy, corporate disputes, and tax reporting and dispute related matters. He has experience in a variety of industries including, telecommunications (i.e., cable, wireline, and wireless infrastructure and businesses), real estate (commercial and industrial), regulated and independent power facilities (i.e., wind, geothermal, nuclear, natural gas, coal, and hydro power), air transportation (i.e., passenger carriers, cargo carriers and fleet valuations), and manufacturing (i.e., cement plants and automotive assembly plants).

Carl has also valued tangible and intangible corporate property for state and local property tax purposes. He has developed methods for determining cost of capital, physical depreciation using “technology substitution”, functional and external obsolescence using “replacement plant” benchmarking. Mr. Hoemke is an author and has also appeared as an expert witness for several matters involving the valuation of business and assets.

Prior to joining Avalara, Mr. Hoemke spent over thirty years in asset and business valuation advisory, and technology consulting, most recently as a Partner at Valentiam Group, Managing Director at Duff & Phelps, Managing Director at Standard & Poor’s, and Partner at Ernst & Young. Carl founded the tax technology firm, CrowdReason, in 2014. Mr. Hoemke started his career as an Industrial and Utility Appraiser at Taylor County Assessor's office in Abilene, Texas.

Mr. Hoemke holds a designation with the American Society of Appraisers as an Accredited Senior Appraiser (ASA) in Business Valuation. Carl received his B.A., Business Administration, Finance, from Abilene Christian University.

# Mary Anne Maples

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**Mary Anne Maples** is Senior Manager of the Professional Services and Training groups for CSC. Specializing in Property Tax and Business License Software and Best Practices.

Mary Anne has extensive experience working with various tax and financial management software packages. A significant aspect of her work includes interfacing with clients and in-house programmers on various projects.

Prior to joining CSC, Mary Anne worked extensively on the development and implementation of various cooperative health care programs and initiatives in the State of California. Working with State government and not-for-profit organizations, she was part of a team that developed a standard application form for physician credentialing and developed a methodology for sharing the information with all pertinent parties. Mary Anne also served on the was California Cooperative for Healthcare Quality, which worked to develop audit tools to measure access to healthcare within California.

Mary Anne is a Project Management Professional (PMP) and received her MBA with an emphasis in Health Care Administration from National University in San Diego.

# Shaun Black

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**Shaun Black** is a Solution Architect and Sales Engineer and brings more than 15 years of experience in the property tax industry.

Shaun is an expert in all areas of property tax—filings, assessments, bills, payments, and accruals—and is familiar with the different property tax requirements in each state.

Prior to Ryan, Shaun worked in developing, implementing, and supporting property tax software at PowerPlan. He then spent several years at PTX Tech (now a part of Tax.com/Ryan) working directly with clients to create custom data solutions to their property tax challenges. Shaun has a deep understanding of property tax systems, processes and of property tax data management and transformation.

A graduate of Georgia Institute of Technology, Shaun lives in Atlanta with his wife and three sons.

# Agenda

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- I. Introductions
- II. What is the purpose of Property Tax Software?
- III. Discuss Property Tax Compliance Pain Points
- IV. How Are Solutions Evolving to Address these challenges?
- V. Automation Implications

# What is the purpose of Property Tax Compliance?

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- Build Best Practices
- Reduce Operational Compliance Costs
- Ensure Fairness of Assessments
- Increase Transparency of Process
- Reduce Penalties and Audit Risk
- Optimize Payment Cash Flow

# Property Tax Pain Points

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- A. Remote Work
  - i. System Access
  - ii. Infrastructure Challenges
    - A. Record Management
      - 1) Mail & Printing Center (Sending and Receiving)
      - 2) Internal Document transfer
    - B. Collaboration
- B. Security
  - i. Data Privacy
  - ii. Ransomware
- C. Data Integrity
- D. Managing the Functional Processes
  - i. Returns
  - ii. Assessment Notices
  - iii. Assessments Appeals
  - iv. Tax Bills
  - v. Documents

# How Are Solutions Evolving to Address these challenges?

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## A. The Cloud

## B. Automation

- i. Data Extraction
- ii. Data Transformation
- iii. Robotic Process
- iv. ERP Connectors / Extractors

## C. Artificial Intelligence

- i. Tax Research – integrated ChatGPT plugins
- ii. Machine Learning – Data Extraction, Data Mapping and Transformation
- iii. Automated Valuation Models (AVM) – Deep Learning



# How Are Solutions Evolving to Address these challenges? (Cont.)

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## D. Data Collection and Syndication

- i. Assessor / Collector Tax Roles
- ii. Assessor / Collector Specific Account Retrieval

## E. Electronic Submissions

- i. Returns
- ii. Payments

## Automation Implications – Open Forum

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- How will automation impact the person, industry, consultants, government?

# Thank you!

## Contacts:

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