

## **2009 AUTHORIZATION OF AGENCY FORM REFERENCE**

### **Background**

Each year assessment jurisdictions in Alberta send assessment notices to assessed persons based on a valuation date of July 1 of the year prior to taxation. For any additional information regarding a property and/or business assessment, the assessed person must contact The City of Calgary. If the assessed person delegates a representative to act on their behalf regarding their 2009 Assessment for the 2009 taxation year (which includes the Advance Consultation Period), a valid Authorization of Agency Form is required **as well** as an accompanying letter signed by the assessed person on their personal or company letterhead indicating the signatory has the authority to enter into agency agreement.

### **Policy**

The *Municipal Government Act (MGA)* provides statutes regarding access to assessment information.

- s299 (1) states that an assessed person can ask the municipality for sufficient information concerning the preparation of their assessment.
- s299 (1) also states the municipality can establish the manner under which the request for that information is made.

**NOTE:** The City of Calgary's Assessment Business Unit requires a validated Authorization of Agency Form and accompanying letter before discussing or releasing assessment information with someone other than the assessed person.

### **2009 Authorization of Agency Form**

The City of Calgary will provide agents an electronic copy of the form in two software application formats, ADOBE-PDF and MS-Word.

Three key points:

1. The form must be completed, validated, and approved prior to discussing account specific details or the processing an Assessment Explanation Supplement Request.
2. Complete the form for an individual property or an individual business assessment account.
3. All information on the Authorization of Agency Form is applicable to the 2009 taxation year only.

Fax the 2009 Authorization of Agency Form and letter to (403)268-2090

**2009 Authorization of Agency Form Guide**

Part/Section of Form	Required Information	Comments
<b>Part I. Account Information</b>		
1) Name of Assessed Person	<ul style="list-style-type: none"> <li>Assessed person as named on the 2009 Assessment roll for an account</li> </ul>	<ul style="list-style-type: none"> <li>An authorization of agency form is <b>invalid</b>, if the assessed person's name listed on the form is different from the exact name on the <b>2009</b> assessment roll.</li> </ul>
2) Assessment Roll Type	<ul style="list-style-type: none"> <li>Check either Property or Business</li> </ul>	
3) Roll number/ Premise Identifier (PID)	<ul style="list-style-type: none"> <li><u>Property record</u> – 9 digit roll number only</li> <li><u>Business record</u> – 9 digit roll number + 4 digit PID</li> </ul>	<ul style="list-style-type: none"> <li>Please ensure accuracy when filling in the account number.</li> <li>If the Roll Number/PID is incorrect, the Authorization of Agency is <b>invalid</b>.</li> <li>A correct address is <b>not sufficient</b> to search for property roll number or Business PIDs.</li> </ul>
4) Account Address	<ul style="list-style-type: none"> <li>Address listed on the 2009 Assessment roll for an account</li> </ul>	<ul style="list-style-type: none"> <li>If the address is incorrect, the Authorization of Agency is <b>invalid</b>.</li> </ul>
<b>Part II. Agent Information</b>		
1) Name of Agent	<ul style="list-style-type: none"> <li>Name of organization or individual acting on behalf of the assessed person</li> </ul>	
2) Contact Name (if different) and position held	<ul style="list-style-type: none"> <li>Name and position of contact person</li> </ul>	
3) Telephone number	<ul style="list-style-type: none"> <li>Telephone number of person identified in (2)</li> </ul>	<ul style="list-style-type: none"> <li>Please ensure the area code is included.</li> </ul>
4) Fax Number	<ul style="list-style-type: none"> <li>Fax Number of individual identified in (2)</li> </ul>	<ul style="list-style-type: none"> <li>Please ensure the area code is included.</li> </ul>
5) Email Address	<ul style="list-style-type: none"> <li>Email address of individual identified in (2)</li> </ul>	

<p><b><u>Part III. Acknowledgment and Certification</u></b></p>	<ul style="list-style-type: none"> <li>• Signature of the assessed person or individual authorized to bind the company.</li> <li>• Printed name of the signatory person and title</li> <li>• The date signed</li> </ul>	<ul style="list-style-type: none"> <li>• Agents should ensure their client has an understanding of this section before signing and dating the documents.</li> <li>• The attached letter referenced in point 2 of Part III must clearly indicate that the signatory person for both the form and letter is authorized to enter into agency agreement with the organization or individual referred to in Part II.</li> <li>• If the signature on the attached letter and the form do not match, the authorization is invalid.</li> </ul>
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**Exceptions:**

If the signatory is the assessed person as listed exactly on the 2009 Annual Assessment Notice, the accompanying letter, stating that the signatory has the authority to enter into agency agreement, is not required.

If the assessed person is authorizing the organization or individual (refer to Part II) to represent multiple properties or businesses, one letter is acceptable, provided that the following conditions are met.

1. The letter is on personal or company letterhead, and clearly states that the signatory is authorized to enter into agency agreement with the organization or individual indicated in Part II, and,
2. The property roll numbers or business PIDs the organization or individual is authorized to represent is listed within the letter or attached to the letter. In the latter case, please make reference to the attachment in the letter and have the assessed person sign and date the separate attachment, and,
3. Each property or business must have its own individual 2009 Authorization of Agency Form.

**NOTE: If the signatory assigning the authorization is a property manager who is NOT listed as the “Care Of” on the 2009 Annual Assessment Notice, please ensure to do ONE of the following:**

1. Attach an additional letter signed by the assessed person on their personal or company letterhead stating that the property management company has the authority to act on their behalf with respect to the 2009 assessment matter and is permitted to assign this authority to another, or
2. Attach the full property management agreement between the assessed person and the particular property management company, or

3. Alternatively, the assessed person could advise The City to send all the assessment notices and assessment information to the management company, rather than directly to the assessed person. The City would then list the management company as a “Care of”, and all notices will be sent to the property management company.

**Additional Information:**

1. All parts of the Authorization of Agency Form must be fully completed, accurate, and legible. Please print/type all information entered on the form (with the exception of signatures).
2. The assessed owner must sign and date both the form and the attached letter.
3. If the assessed person does not have a company letterhead, the assessed person’s name and mailing address as a header is acceptable.
4. Each individual roll number/PID requires a completed Authorization of Agency Form and letter. Please indicate the property or business roll number/PID and address on the letter.
5. The Authorization of Agency process can take up to seven (7) business days. Please consider this process time prior to making an appointment with an assessor to discuss the particulars of an account.

**The City of Calgary will reject Authorization of Agency Forms that do not comply with the requirements under the manner in which we request. Agents will be notified of rejections via fax.**

For further information regarding the 2009 Authorization of Agency Form process, please send a written inquiry via fax to (403)268-2090