

Silver Oak
Advisors, LLC

Financial Solutions that impact your bottom line

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Our Vision

- Silver Oak Advisors was formed because of the absolute necessity for taxpayers to have access to a true, national tax advocacy firm that utilizes local and “specific property type” experts for every assignment.
- Silver Oak manages the use of the best local tax firms in each geographic and industrial market. Today, the most sought after professionals in our business work for themselves in smaller practices and boutique law firms. Silver Oak acts as the manager and oversight conduit that brings these local professionals together to work for our clientele, while providing a single point of contact and source of information.

Our Management Team

Glenn Williams ***Managing Director***

- Former Senior Manager and Complex Properties Practice Leader, KPMG
- Combined 18 years experience in State and Local Taxation with the Big Four professional services firms
- Specialization and Expertise with Manufacturing, Industrial and Utility properties
- Specialization in Identification and Certification of Pollution Control Tax Exemptions and Credits
- Formerly managed the Personal Property Tax Compliance Group for a major accounting firm, representing national clients in tax compliance, consulting, appeals and audit defense work.
- Developed specific initiatives and marketing studies within the transportation, chemical fertilizer, paper and pulp, sugar and high-tech industries to assist clients in reducing ad valorem property taxes, based upon functional and economic obsolescence trends.

Our Management Team (continued)

Brian Scully

Director, Telecom Practice

- Former Senior Manager and Communications Industry Practice Leader, Paradigm Tax Group
- Former Manager, KPMG Complex and Industrial Property Taxes
- Former Industry Personal Property Department Manager, experienced with Corporate Aviation, Distribution, Retail, Transportation, Industrial Revenue Bonds/Abatements
- National experience in all state and local tangible personal property tax filings, appeals, assessment negotiations, audits, multi-state property tax compliance, in-house property tax function analysis and re-engineering and tax projections, property tax software integration.
- Experience includes all business personal property reporting states and Puerto Rico.
- Extensive work with inventory, freeport / in-transit / interstate commerce, prior year corrections for refunds, IRB / abatement reviews

Our Management Team (continued)

Jeff Talton

Director, Industrial Properties

- Former Managing Consultant, Paradigm Tax Group Complex Industrial Practice – develop and implement innovative state and local tax strategies concerning public utilities, telecommunications and manufacturing industries.
- Former Senior Consultant with Deloitte’s National Property Tax Practice - Complex Properties national property tax team member
- Deloitte Tax’s Southeast Property Tax consulting specialist
- Six years experience in State and Local Taxation with the Big Four professional services firms, specializing in ad valorem property tax issues.
- Former Consultant, KPMG Complex/Industrial Property Tax Group

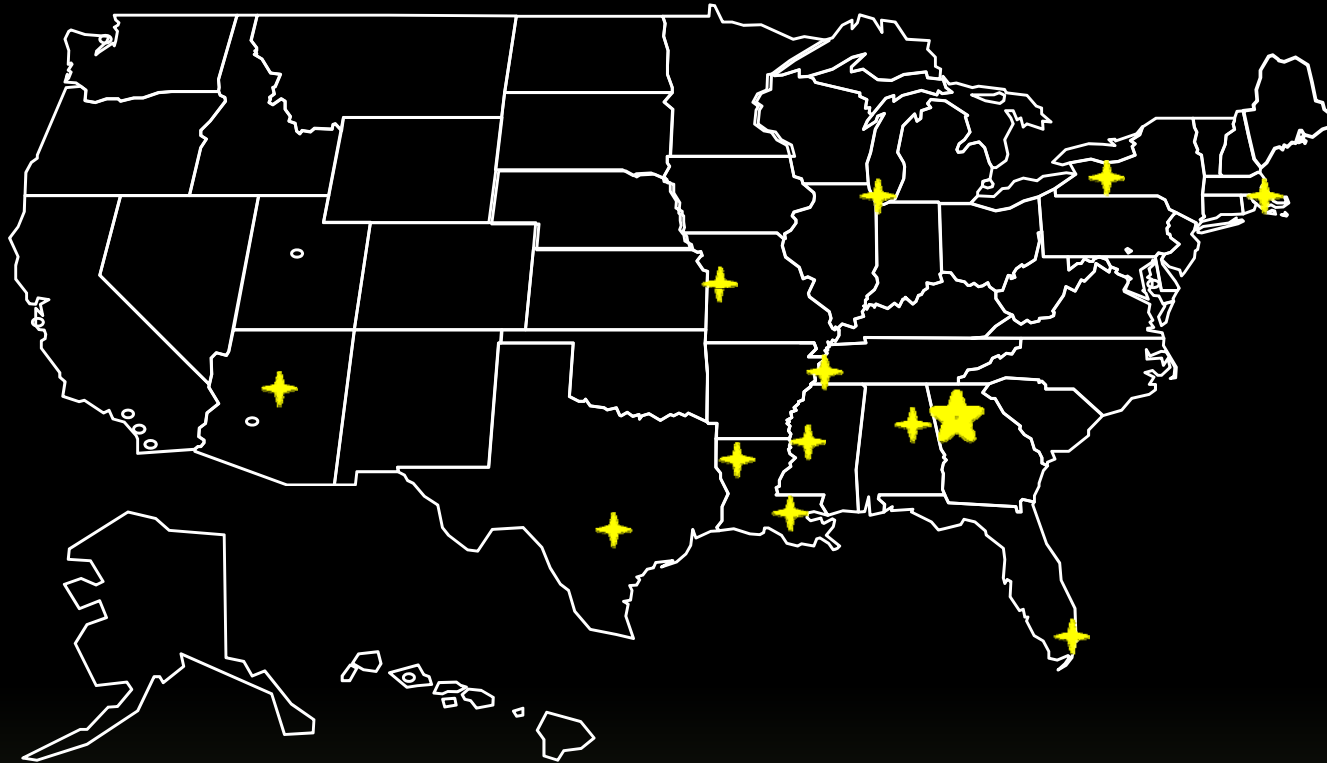
Our Management Team (continued)

Paige Brown

Director, State and Local Tax

- Former Southeast Practice Leader, Property Tax, Outsourcing, Credits and Incentives for a National Accounting Firm.
- State and Local Tax experience for more than 20 years includes working in the offices of a national accounting firm in New York City, Atlanta and Washington, DC.
- Owner, Property tax consulting firm representing state and local tax assessors offices
- Specializes in multi-jurisdictional state and local tax services for a variety of industries including transportation, manufacturing, retail and real estate development and investment.
- Focus on national property tax services including real and personal property strategic tax planning, appeal and negotiation services and tax technology solutions.

Our Network of Professionals



Headquarters – Atlanta, Georgia

Network Offices:

Buffalo, NY

Austin, TX

Jackson, MS

Chicago, IL

Shreveport, LA

Memphis, TN

Fort Lauderdale, FL

Baton Rouge, LA

Boston, MA

Kansas City, MO

Birmingham, AL

Phoenix, AZ

Scope of Services

Complex, Industrial and Business Personal Property Tax Services

- Proactive State and Local Tax Compliance Filing
- Traditional Multi-State and Local Compliance Filing
- Personal Property Audit Support and Defense
- Pollution Control Identification, Certification and Implementation Strategies
- Functional and Economic Obsolescence Review and Quantification

Scope of Services

Complex, Industrial and Business Personal Property Tax Services

- Pre and Post-Acquisition Due Diligence Tax Minimization Analysis
- Tax Incentives and Abatement Analysis and Implementation
- Construction in Progress Taxability Studies
- Inventory Valuation and Exemption Services
- Intangible Carve-Out Studies
- Fair Market Valuation and Ghost Asset Appraisals

Scope of Services

Real Estate Tax Services

- Annual Assessment Review and Appeals
- Litigation Support
- Proactive, Pre-Enrollment Consulting
- Purchase Price Allocation
- Appraisal Support

Industries of Expertise

- Manufacturing and Industrial
 - Chemical
 - Pulp and Paper
 - Automotive
 - Fertilizer
 - High Tech
- Airlines
- Leasing
- Telecommunications
- Cable MSO's
- Broadband

Selected Results

- Alabama paper and pulp manufacturer – abatement review, assessment reductions and refunds – tax benefit of \$517,199.
- Georgia automotive retailer - assessment reductions and refunds – tax benefit of \$568,763.
- Mississippi fertilizer manufacturer – tax abatements and assessment reductions – one year tax benefit of \$292,305.
- National door manufacturer – assessment reductions – tax benefit of \$1.2 million over a 3-year period.
- South Carolina high tech manufacturer -assessment reductions and refunds – one year tax benefit of \$211,779.
- Tennessee fertilizer & chemical manufacturer – assessment reduction and litigation support – 8-year tax benefit of \$2.8 million.

Selected Results (continued)

- Mississippi manufacturer – tax abatement project – one year tax benefit of \$448,000.
- Georgia paper and pulp manufacturer – pollution control engagement – one year tax benefit of \$592,000.
- Regional telecom service provider – functional and economic obsolescence – multiple year tax benefit of \$100,000 annually.
- Large Cable MSO – reclassification of taxable and non-taxable assets – multiple year tax benefit of \$230,000 annually.
- National telecom service provider – functional and economic obsolescence – multiple year tax benefit of \$140,000 annually.
- Maintain and control \$10,000,000 property tax liability for national telecom service provider through pro-active compliance.

Selected Results (continued)

- Florida For-Profit Healthcare Provider – Obtained a \$205,400 real estate reduction.
- Georgia Hospitality Provider – Obtained a \$127,125 real estate reduction.
- North Carolina Manufacturer– Obtained a \$342,972 real estate reduction.
- Georgia State Services Provider – Obtained a \$494,089 real estate reduction.
- Georgia Manufacturer - Obtained a \$92,218 real estate reduction.
- Alabama Telecom Provider - Obtained a \$51,035 real estate reduction.
- Tennessee Manufacturer - Obtained a \$132,672 real estate reduction.

Silver Oak Fee Structure

Silver Oak Advisors strives to create a direct relationship between fees and savings results achieved.

Silver Oak's Perspective

- Our fees are proposed based on a balance between the cost of service, the anticipated results and the level of risk associated with achieving those results.

Client's Perspective

- The fee should reflect the relationship of risk level assumed and the potential benefit. Compensation structures will vary dramatically depending on the size scope and time needed to complete the project.

Fees can be in the form of time and materials, contingent (performance based), flat fee or a blend of each. It comes down to what the client is most comfortable with.

Contact Information

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