#### **BOARD of SUPERVISORS**



City Hall
Dr. Carlton B. Goodlett Place, Room 244
San Francisco 94102-4689
Tel. No. 554-5184
Fax No. 554-5163
TDD/TTY No. 554-5227

### MEMORANDUM

#### **RULES COMMITTEE**

#### SAN FRANCISCO BOARD OF SUPERVISORS

TO:

Supervisor Norman Yee, Chair

**Rules Committee** 

FROM:

Alisa Miller, Clerk, Rules Committee

DATE:

July 28, 2014

SUBJECT:

**COMMITTEE REPORT, BOARD MEETING** 

Tuesday, July 29, 2014

The following file should be presented as a **COMMITTEE REPORT** at the Board meeting on Tuesday, July 29, 2014. This item was acted upon at the Special Committee Meeting on Thursday, July 24, 2014, at 2:00 p.m., by the votes indicated.

Item No. 57 File No. 140839

Motion appointing Michael Slattery (residency requirement waived), term ending September 7, 2015, and James Reynolds, term ending September 5, 2016, to the Assessment Appeals Board No. 3.

PREPARED IN COMMITTEE AS A MOTION RECOMMENDED AS A COMMITTEE REPORT

Vote: Supervisor Norman Yee - Aye

Supervisor Katy Tang - Aye Supervisor David Campos - Aye

c: Board of Supervisors
Angela Calvillo, Clerk of the Board
Rick Caldeira, Deputy Legislative Clerk
Jon Givner, Deputy City Attorney

File No.	140839	Committee Item No.	4	
		Board Item No	57	

## **COMMITTEE/BOARD OF SUPERVISORS**

AGENDA PACKET CONTENTS LIST

Committee:	Rules	Date <u>July 24, 2014</u>
•	pervisors Meeting	Date July 20,2014
Cmte Boar		Report
OTHER	(Use back side if additional spa	ce is needed)
Completed h	Form 100	Date July 18, 2014
	y: Alisa Miller	Date Ullu, 20, 2014

[Appointments, Assessment Appeals Board No. 3 - Michael Slattery and James Reynolds]

Motion appointing Michael Slattery (residency requirement waived), term ending September 7, 2015, and James Reynolds, term ending September 5, 2016, to the Assessment Appeals Board No. 3.

MOVED, That the Board of Supervisors of the City and County of San Francisco does hereby appoint the hereinafter designated persons to serve as members of the Assessment Appeals Board No. 3, pursuant to the provisions of California Revenue and Taxation Code, Section 1623, and San Francisco Administrative Code, Sections 2B.1 through 2B.11, for the terms specified:

Michael Slattery (residency requirement waived), seat 5, new appointment, must have a minimum of five years professional experience in the State of California as one of the following: Certified Public Accountant or Public Accountant; licensed Real Estate Broker; Attorney; or a Property Appraiser accredited by a nationally recognized professional organization, certified by the Office of Real Estate Appraisers, or certified by the State Board of Equalization, for the unexpired portion of a three-year term ending September 5, 2015.

James Reynolds, seat 6 (Alternate Member), new appointment, must have a minimum of five years professional experience in the State of California as one of the following:

Certified Public Accountant or Public Accountant; licensed Real Estate Broker; Attorney; or a Property Appraiser accredited by a nationally recognized professional organization, certified by the Office of Real Estate Appraisers, or certified by the State Board of Equalization, for the unexpired portion of a three-year term ending September 5, 2016.

FURTHER MOVED, That the Board of Supervisors makes the following findings:

- 1. The membership of the Assessment Appeals Board No. 3 has a goal to be representative of the diversity of the City and County of San Francisco.
- 2. Applicant Michael Slattery, who is not a resident of San Francisco, is a person with experience that uniquely qualifies him to serve on the Assessment Appeals Board No. 3.
- 3. The Assessment Appeals Board No. 3 has attempted to fill the position, for which Michael Slattery was nominated, with an individual who is a City resident and who has the specific experience, skills, and qualifications, but has been unable to do so at this time. The Rules Committee has certified that Michael Slattery is qualified to serve on the Assessment Appeals Board No. 3.
- 4. After exercising due diligence, the Board of Supervisors concludes that there is no other possible representative, who is a resident of San Francisco, and who has the specific experience, skills, or qualifications possessed by this applicant, and who is willing to serve on the Assessment Appeals Board No. 3 at this time; and, be it FURTHER MOVED, That the Board of Supervisors waives the residency requirement for Michael Slattery, as allowed in cases where no qualified City resident, willing to serve, can

be found, pursuant to Charter, Section 4.10,1 that requires person(s) appointed to boards, commissions, and advisory bodies established by legislative act of the Board of Supervisors

to be resident(s) of the City and County of San Francisco.

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JAN 2 4 2015

## Assessment Appeals Board City and County of San Francisco (415) 554-6778 Fax (415) 554-6775



City Hall, Room 405
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4697

Complete and return thi	s original Application	n to the Assess	ment Appeals Board	
Application for Appointment (Please circle one)	nt to: Board Board Board	<b>2</b> or	Board 1 Alternate Board 2 Alternate Board 3 Alternate	
Enter your name, mailing address and daytime for public review, you may list your business/off other personal contact information.	telephone number in the ice address, telephone n	spaces provided. umber and e-mail	Because this form is a document avai address in lieu of your home address of	lable or
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Are you a United States citizen, or a reside	nt alien who is eligible	for and has app	lied for citizenship?	Vo
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THE STATE BAR OF CALIFORNIA

MICHAEL KEVIN SLATTERY

PRESERVE AND IMPROVE OUR JUSTICE SYSTEM N ORDER TO ASSURE A FREE AND JUST SOCIETY UNDER LAW. Daily active members are entitled to practice law.

Chief Executive Officer

Thursday, June 12, 2014

#### ATTORNEY SEARCH

#### Michael Kevin Slattery - #107303

Current Status: Active

This member is active and may practice law in California.

See below for more details.

#### Profile Information

The following information is from the official records of The State Bar of California.

Bar Number:

107303

Address:

Idyllwild

Phone Number:

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Idyllwild, CA 92549

Fax Number:

Not Available mslat@

Map it

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Business Law

e-mail:

Undergraduate School: Princeton Univ; Princeton NJ

County: District:

Sections:

Riverside

District 4

Law School:

USC Law School; Los Angeles CA

#### Status History

**Effective Date** 

Status Change

Present

Active

12/3/1982

Admitted to The State Bar of California

Explanation of member status

#### Actions Affecting Eligibility to Practice Law

#### **Disciplinary and Related Actions**

Overview of the attorney discipline system.

This member has no public record of discipline.

#### **Administrative Actions**

This member has no public record of administrative actions.

Start New Search »

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	Schedule B - Real Property - schedule attached Schedule E - Income - Gifts - Travel Payments - schedule attached	
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#### Miller, Alisa

From: Sent:

Michael Slattery <mslat@pacbell.net> Monday, July 21, 2014 2:04 PM

Subject:

Re: Hearing: Assessment Appeals Board No. 3

Thanks Alisa,

Here's a short summary of my qualifications. If this is not too informal, please circulate to the Committee members.

- 1. From mid 2002-end of 2009, I was a Deputy in the SF City Attorney's Office. One of my main responsibilities was representing the SF Assessor in property tax assessment appeals.
- 2. I am now Of Counsel at Lamb & Kawakami LLP, a Los Angeles based law firm. I have represented firm clients (taxpayers) in assessment appeals in Los Angeles, San Diego and Orange counties. (I have not represented any taxpayers before the SF appeals boards)
- 3. I have been an active participant in the County Counsels Association Taxation Section. I have made presentations to that group on property tax procedures (escape and supplemental assessment), the treatment of tax claims in bankruptcy cases, and on the taxation of intangible property rights.
- 4. I'm a strong believer in the assessment appeals process because it allows property owners a prompt, low cost, and relatively informal way to exercise legal rights.

Thank you and the Committee for the opportunity to interview.

Mike Slatteryp

JGGSSment / Jppeals Goard

Revised July 2013

## Assessment Appeals Board City and County of San Francisco (415) 554-6778 Fax (415) 554-6775



City Hall, Room 405 1 Dr. Carlton B. Goodlett Place San Francisco, CA 94102-4697

Complete and return this original Application to the Assessment Appeals Board	
Application for Appointment to: Board 1 or Board 1 Alternate  (Please circle one) Board 2 or Board 2 Alternate  Board 3 or Board 3 Alternate	
Enter your name, mailing address and daytime telephone number in the spaces provided. Because this form is a document available for public review, you may list your business/office address, telephone number and e-mail address in lieu of your home address or other personal contact information.	ole
Do you authorize release of your private/personal information?	
Name: JAMES REYNOLDS Home Address: - MCALLISTER Star	
City: SAN FORNUSCO State: Clo Zip code: 99118	
Business Address: 2001 MCAllister & #11 City: San Fremus State: CD Zip Code: 94118	
Home Phone: 415- 359-9660 Fax #: 415-359-9660	
Pager #: E-Mail Address: APPRINSERSUMSFC	
Are you a United States citizen, or a resident alien who is eligible for and has applied for citizenship? 🕱 Yes 🗌 No	ì
Have you ever been convicted of a felony in this state, or convicted of any offense which, if committed in this state, would be a felony?   Yes No  (If yes, please attach a statement describing the offense(s) for which you have been convicted, the date of the conviction(s), and the court(s) that convicted you.)	
Pursuant to Ordinance No. 393-98 the following qualifications are required:	
A person shall not be eligible for nomination for membership on an assessment appeals board unless he or she has a minimum of five years' professional experience in this state as one of the following: (1) certified public accountant or public accountant; (2) licensed real estate broker; (3) attorney; or (4) property appraiser accredited by a nationally recognized professional organization, or property appraiser certified by either the Office of Real Estate Appraiser or by the State Board of Equalization. Documentation of qualifying experience must be submitted with this application form. This requirement does not apply to incumbent board members nominated for appointment to their same seats.	
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Would you be able to attend Day Meetings? Yes Do Evening meetings? Yes No How many days a week would you be available for hearings? How many evenings a week? How many evenings a week?	
Appearance before the RULES COMMITTEE is a requirement before any appointment can be made.	
Date: 3 19 2014  Applicant's Signature:  Applicant's Signature:	
For Office Use Only: Appointed to Board #: Seat #: Term Expires:	

#### Licensee Details:

#### Back to Results

New Search

First Name	James
Middle	F
Last Name	Reynolds
License Number	027371
Company	James Reynolds
Phone	
Street	McAllister Street, No.
City	San Francisco
State	CA
ZIP	94118
County	San Francisco
Existing License	Renewal - USPAP
License Level	AR
License Status	Active
Date Issued	12/15/2013
Date Expired	12/14/2015
Renewal Issued	
Renewal Expires	
Next Renewal	Full CE
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License History	Possible License Types: License, Temporary 150-Day, Temporary Practice Permit, Out of

Possible License Types: License, Temporary 150-Day, Temporary Practice Permit, Out of State, Reciprocal

Possible License Levels: Trainee, Residential, Certified Residential, Certified General, Temporary

Possible License Status: Active, Expired, Government Status, Pending Active, Retired, Restricted, Revoked, Surrendered, Suspended

<u>License</u> <u>Status</u>	License Level	<u>License</u> <u>Type</u>	Effective <u>Date</u>	Expiration Date
Active	Certified Residential	License	12/15/2013	12/14/2015
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Expired	Certified Residential	License	12/15/2009	12/14/2011
Expired	Certified Residential	License	12/15/2007	12/14/2009
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## STATEMENT OF ECONOMIC INTERESTS **COVER PAGE**

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Schedule A-1 - Investments	s – schedule attached	Г	Schedule C - Incor	ne Loans. & Busii	ness Positions – schedule attache
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### SCHEDULE A-1 Investments

# Stocks, Bonds, and Other Interests (Ownership Interest is Less Than 10%)

Do not attach brokerage or financial statements.

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Ja	mes Reynolds

NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
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IF APPLICABLE, LIST DATE:	IF APPLICABLE, LIST DATE:
	/ / 13 / / 13
ACQUIRED DISPOSED	ACQUIRED DISPOSED
NAME OF BUSINESS ENTITY	► NAME OF BUSINESS ENTITY
P HAME OF BOSINESS ENTITY	January Comments
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS EUSINESS
FAIR MARKET VALUE	FAIR MARKET VALUE
S2,000 · S10,000	7 \$2,000 - \$10,000
S100,001 - \$1,000,000 Over \$1,000,000	\$100,001 - \$1,000,000 Dver \$1,000,000
NATURE OF INVESTMENT	NATURE OF INVESTMENT
Stock Other	Stock Other (Describe)
Partnership   Income Received of SD - S499   Income Received of S500 or More (Report on Schedule C)	Partnership   Income Received of S0 - \$499   O Income Received of \$500 or More (Repair on Schedule C)
IF APPLICABLE, LIST DATE.	IF APPLICABLE, LIST DATE:
//_13/	
ACQUIRED DISPOSED	ACQUIRED DISPOSED
NAME OF BUSINESS ENTITY	➤ NAME OF SUSINESS ENTITY
GENERAL DESCRIPTION OF THIS BUSINESS	GENERAL DESCRIPTION OF THIS EUSINESS
FAIR MARKET VALUE	FAIR MARKET VALUE
S2.000 - \$10.000 S10.001 - \$100,000	S2,000 - \$10,000
S100,001 - \$1,000,000 Over \$1,000,000	S100.001 - \$1,000,000 Dver \$1,000.000
NATURE OF INVESTMENT	NATURE OF INVESTMENT
Stock Other	Stock Other
(Describe)	(Describe)
Partnership   Income Received of S0 - \$499   Income Received of \$500 or More (Report on Schedule C)	Partnership   Income Received of S0 - S499   Partnership   Income Received of S500 or More (Report on Schedule C)
IF APPLICABLE, LIST DATE.	IF APPLICABLE, LIST DATE:
7 / 13 / / 13	
	ACQUIRED DISPOSED
1	1
Comments	

## SCHEDULE B Interests in Real Property (Including Rental Income)

CALIF	ORNIA JICAL PR	FORM ACTICES	7 COMMIS	O)() SION	
James	Reyno	lds			

ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS	► ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS		
2001 McAllister Street, #11			
CITY	CITY		
San Francisco			
FAIR MARKET VALUE   IF APPLICABLE, LIST DATE:	FAIR MARKET VALUE   IF APPLICABLE, LIST DATE:   \$2,000 - \$10,000		
NATURE OF INTEREST	NATURE OF INTEREST		
Ownership/Deed of Trust Easement	Ownership/Deed of Trust Easement		
Leasehold	Leasehold		
IF RENTAL PROPERTY, GROSS INCOME RECEIVED	IF RENTAL PROPERTY, GROSS INCOME RECEIVED		
☐ 50 - \$499	S0 - \$499		
510,001 - \$100,000 OVER \$100,000	S10.001 - S100,000 OVER S100,000		
SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.  None	SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.  None		
* You are not required to report loans from commercial le	ending institutions made in the lender's regular course of without regard to your official status. Personal loans and		
loans received not in a lender's regular course of busin	ess must be disclosed as follows:		
NAME OF LENDER*	NAME OF LENDER*		
Bank of America			
ADDRESS (Eusiness Address Acceptable)	ADDRESS (Business Address Acceptable)		
BUSINESS ACTIVITY, IF ANY. OF LENDER Bank/Lender	BUSINESS ACTIVITY, IF ANY, OF LENDER		
INTEREST RATE TERM (Months/Years)	INTEREST DATE		
4 15 Years	INTEREST RATE TERM (Months/Years)		
None None	%None		
HIGHEST BALANCE DURING REPORTING PERIOD	HIGHEST BALANCE DURING REPORTING PERIOD		
\$500 - \$1,000	S500 - \$1,000		
S10,001 - \$100,000	S10,001 - \$100,000 OVER \$100,000		
Guarantor, if applicable	Guarantor, if applicable		
Comments:			

#### San Francisco BOARD OF SUPERVISORS

Date Printed:

July 18, 2014

Date Established:

July 3, 2013

Active

#### ASSESSMENT APPEALS BOARD NO. 3

#### **Contact and Address:**

Dawn Duran Assessment Appeals Board City Hall, Room 405 San Framcsco, CA 94102

Phone: (415) 554-6778 Fax: (415) 554-6775

Email: Dawn.Duran@sfgov.org

#### **Authority:**

Administrative Code, Chapter 2B et seq. (Added by Ordinance No. 37-67; Amended by Ordinances Nos. 110-68, 82-94, 86-96, 393-98, 273-99, and 128-13) and California Revenue and Taxation Code, Section 1620-1630.

#### **Board Qualifications:**

The Assessment Appeals Board No. 3 consists of eight (8) members (five (5) regular members, and three (3) alternate members) all appointed by the Board of Supervisors. No person may concurrently hold a seat on more than one of the three Assessment Appeals Boards.

The Board members' term of office is three years, beginning on the first Monday in September. In the event of a vacancy, the newly appointed member shall serve for the remainder of the unexpired term.

The Board shall have the following qualifications as stated in the eligibility criteria set forth in California Revenue and Taxation Code, Section 1624.05, as follows: Must have a minimum of five years professional experience in the State of California as one of the following: Certified Public Accountant or Public Accountant; licensed Real Estate Broker; Attorney; or a Property Appraiser accredited by a nationally recognized professional organization, certified by the Office of Real Estate Appraisers, or certified by the State Board of Equalization.

Hearing Officers: The regular and alternate members of the Board shall also serve as hearing officers. The Clerk shall designate members to act as hearing officers for particular applications using a rotating system designed to assure that all members with the same priority level have an equal opportunity over time to participate as hearing officers. The Clerk shall designate hearing

#### San Francisco BOARD OF SUPERVISORS

officers in the following priority order: (1) the regular member of Assessment Appeals Board No. 3; (2) the alternate members of Assessment Appeals Board No. 3; (3) the alternate members of Assessment Appeals Board No. 2; (4) the alternate members of Assessment Appeals Board No. 1; (5) the regular members of Assessment Appeals Board No. 2; and (6) the regular members of Assessment Appeals Board No. 1. In their capacity as assessment hearing officers, the officers shall serve at the pleasure of and by contract with the Board of Supervisors.

It shall be the duty of each Assessment Appeals Board to equalize the valuation of the taxable property within the City and County for the purposes of taxation in the manner and subject to the limitations contained in Article XIII of the California State Constitution. Assessment Appeals Board No. 3 shall have jurisdiction to hear applications for reductions only for property assessed at less than \$50,000,000, excluding applications involving possessory interests or real property located all or in part within Assessor's Block Nos. 1-876 or 3701-3899.

Compensation: \$100 for each one-half day of service.

Report: Pursuant to California Revenue and Taxation Code, Section 1639, the hearing officer shall prepare a summary report of the proceedings together with a recommendation on the application and shall transmit this report and recommendation to the Clerk of the Board of Supervisors.

Sunset Clause: None