

# TreppLoan™ for Tax Assessors

Trepp provides tax assessors with the industry's most comprehensive, easy-to-use, web-based suite of data, analytics, and research. In a single source solution, Trepp assists tax assessors create mass appraisal models, quantify individual property performance metrics and county-level statistics, and benchmark comparable properties.

Powered by the largest available dataset of securitized commercial and multifamily properties and a robust analytics platform, only Trepp provides the parcel level financial data necessary for more accurate and timely assessments.

## TAX ASSESSORS ACROSS THE COUNTRY ARE LEVERAGING TREPP TO ACCESS:

- ✓ Detailed, line-item income and expense information, including property performance from Potential Gross Income to Net Operating Income
- ✓ Property level appraisal and valuation history compiled at the time of securitization
- ✓ Accurate expense information including below the line capital expenditures, leasing commissions and tenant improvements
- ✓ Normalized loan and property data sourced directly from property owners – not survey data from brokers
- ✓ Custom benchmarking and comp selection for operating statement analysis
- ✓ Precision property and loan search functionality based on 50+ key selection criteria

## TREPP ALLOWS TAX ASSESSORS TO:

- ✓ **Create** more accurate appraisal models and property valuations
- ✓ **Build** public trust with assessments based on current and accurate market data
- ✓ **Improve** efficiencies by utilizing a streamlined process for collecting detailed financial data
- ✓ **Reduce** assessment bias by systematically analyzing and integrating data in the assessor's workflow
- ✓ **Verify** the accuracy of current assessments and in assessment appeals
- ✓ **Leverage Trepp's CRE expertise** with dedicated client service support and assessment expertise

## WHY TREPP LOAN?

The Trepp standard means that your data will be delivered in context, so you can generate assessments more efficiently and accurately. Powered by the most robust analytics and visualization tools in the assessor industry, Trepp enables you to see both non-securitized and securitized loan and property information as it relates to your own market.

## ADDITIONAL ASSESSOR SERVICES

- ✓ Custom and full scale client advisory and implementation services
- ✓ Onsite review of assessor workflow with reporting options

## ABOUT TREPP

Trepp, LLC, founded in 1979, is a leading provider of data, analytics, and technology solutions to global securities and investment management industries. Trepp specifically serves three key sectors: structured finance commercial real estate, and banking to help market participants meet their objectives for surveillance, credit risk management, and investment performance. Trusted by the industry for the accuracy of its proprietary data, Trepp provides clients sophisticated, comprehensive models and analytics. Trepp is wholly owned by Daily Mail and General Trust (DMGT).

For more information, please contact Chris Summers at [chris\\_summers@trepp.com](mailto:chris_summers@trepp.com) or 214-735-2387.



September 22nd, 2022

Todd Orr  
Blount County Assessor's Office  
351 Court Street  
Blount County Courthouse  
Maryville, TN 37804  
Todd:

Thank you for giving Trepp the opportunity to earn your business. Trepp Inc., founded in 1979, delivers capital markets quality information, software, technology & analytics solutions to over 1,000 institutional, municipal, and regulatory clients and has over 3,000 users every day. Our customers rely and depend on the accuracy, timeliness, and veracity of our data to make better and faster commercial real estate investment decisions. We are confident that using TreppLoan™ will not only save you time and money in your data gathering efforts but also help you make more informed valuation assessments by leveraging our income, expense, and transaction data. Specifically, the Trepp platform would provide the Blount County with the following:

### **Key Feature and Advantages**

#### **Data Advantage**

##### Core Property Information:

- Largest commercially available CMBS & Securitized loan & property data offering
- Full Income & Expense Data at the property level
- Trends and Rankings Dashboard
- Portfolio analytics, Deal List
- User uploaded data
- Rental & Sales Comps
- Largest number of securitization related data points/fields in addition to over 100 Trepp derived fields
- GSE Agency led Multifamily securitization information
- Institution quality control (qc) for all data used in TreppLoan™ (identical QC as our Market standard CMBS Bond Analytics & Trading platform)
- The most up-to-date servicer commentary (including modification and commentary updates)
- Proprietary capital market and balance sheet lending spreads
- Lender opinion of Cap Rates and actual Appraised Values

- 3-year Historical Property level Operating Statements

#### Additional CRE Data

- Recorded title company & municipal data & transaction history
- Access to weekly and monthly research reports from Trepp's CRE economists

### **Property Analytics**

#### Robust Loan and Property Analytics

- Income and expense Comps tool using the latest in GIS technology
- Metro Area performance and benchmarking reports
- Full insight into the CMBS market from a debt, valuation, and property performance standpoint
- Track Lender opinion of Cap Rate and Appraised Values across property types and tenants/retailers

#### Market Analytics for more informed Assessments

- Market snapshot: recent transactions and pricing information
- Customized property market income and expense benchmark reports
- Stratification reports to slice and data for big data analytics

#### Tools and Functionality

- Robust search functionality at the loan and property level
- Customize screens with easy print and download for internal sharing and reporting
- User define alerts allowing notification to track changes in appraised value at a market or property level to easily keep track of current valuation trends.
- Benchmark individual property assessments directly in Trepp to build customized reports on disputed assessments.

### **Customer Support**

#### Dedicated Client Support Team for training and assistance

- Introductory training
- Ongoing individual product training as requested
- Access to extensive online Knowledge Base on CRE and CMBS subject matter

We believe TreppLoan™ represents the highest quality set of loan and property information available for securitized loans. Our data provides significant transparency into both loan and property performance and market trends. Trepp's data serves as a proxy when looking for

commercial real estate trends. We are proud to serve 27 of the top 33 banks who use our data to build their stress testing models for compliance with the Dodd Frank legislation. We are confident the level of data granularity combined with our superior search and analytic web interface will lead to greater workflow efficiency.

### **TreppLoan™ Pricing**

**Access to TreppLoan™ / Portfolio Analytics:**

\$21,600 annual

#### **Additional contract considerations:**

- Access to all TreppLoan Tennessee data
- Initial 3-year term
- 5% annual increase in year 2 and 3
- Logins for all appraisers
- Training & Dedicated Account Representative for ongoing support

We look forward to having Blount County as a client and to provide your agents with a robust set of tools to make more informed property valuation assessments.

Best regards,

Shah Ahmad  
Sales Director  
Trepp, LLC  
600 5<sup>th</sup> Avenue  
7<sup>th</sup> Floor  
New York, NY 10020  
Tel: 626-529-6606

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October 18, 2022

Todd Orr, Property Assessor  
Blount County Property Assessor  
351 Court Street  
Blount County Courthouse  
Maryville, TN 37804  
[torr@blounttn.org](mailto:torr@blounttn.org)

Dear Mr. Orr,

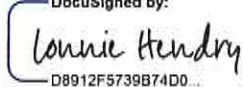
This letter is to confirm that, while other vendors provide similar CMBS data, none provides exactly the same data or user interface with all the critical analytics/features as TreppLoan. As such, TreppLoan is a sole source service distributed, to the best of our knowledge, by Trepp, Inc. TreppLoan is licensed directly by institutions from Trepp, Inc. at the address listed above.

There is no other service that has the combination of comps, benchmarks, historical financials and numerous proprietary derived fields such as implied cap rate, spreads and property sub-types, which, to the best of our knowledge, are solely unique to TreppLoan.

If you desire additional information, do not hesitate to contact Shah Ahmad at (224) 200-6274 at any time or visit our website at [www.trepp.com](http://www.trepp.com).

Thank you for your interest in our service.

Sincerely,

DocuSigned by:  


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Lonnie Hendry, Jr.  
Senior Vice President, Head of CRE & Advisory