



# Chapter 313 Annual Eligibility Report Form

Form 50-772  
(Revised July 2013)

Hillsboro ISD  
School District Name

2014  
Tax Year Covered in This Report

0.2600  
I&S Tax Rate

1.1500  
M&O Tax Rate

IKO Southwest Inc.  
Company Name

John Anhang john.anhang@iko.com  
Company Contact Information

6 Denny Road, suite 200, Wilmington DE 19809  
Company Address

NOTE: This form must be completed by an authorized representative of each approved applicant and each entity with property subject to the limitation agreement. It must be submitted to the school district by May 15th of every year using information from the previous tax (calendar) year. For limitation agreements where there are multiple company entities that receive a part of the limitation provided by the agreement: 1) each business entity not having a full interest in the agreement should complete a separate form for their proportionate share of required employment and investment information; and, 2) separately, the school district is required to complete an Annual Eligibility Report that provides for each question in this form a sum of the individual answers from reports submitted by each entity so that there is a cumulative Annual Eligibility Report reflecting the entire agreement.

10206360074  
Texas Taxpayer ID of Applicant

Nov. 10, 2014  
Date of Agreement Approval

2015  
First Complete Tax Year of the Qualifying Time Period

2017  
First Tax Year of the Limitation

32053745421  
Texas Taxpayer ID Reporting Entity (if appropriate)

IKO Southwest Inc.  
Original Applicant Name

2016  
Last Tax Year of the Qualifying Time Period

\$20 million  
Amount of the Limitation at the Time of Application Approval

## QUALIFIED PROPERTY INFORMATION

\$450,000  
Market Value

n/a  
I&S Taxable Value

n/a  
M&O Taxable Value

Is the business entity in good standing with respect to Tax Code, Chapter 171?  
(Attach printout from Comptroller Web site: <http://www.window.state.tx.us/taxinfo/coasintr.html>) ..... ☒ Yes ☐ No

Is the business entity current on all taxes due to the State of Texas? ..... ☒ Yes ☐ No

Is the business activity of the project an eligible business activity under Section 313.024(b)? ..... ☒ Yes ☐ No

Please identify business activity: manufacturing

What was the application review start date for your application (the date your application was determined to be complete)? ..... June 11, 2014  
(This question must only be answered for projects with applications approved after June 1, 2010.)

How many new jobs were based on the qualified property in the year covered by this report? (See note on page 3.) ..... nil

What is the number of new jobs required for a project in this school district according to 313.021(2)(A)(iv)(b), 313.051(b), as appropriate? .....

If the applicant requested a waiver of minimum jobs requirement, how many new jobs must the approved applicant create under the waiver? ..... n/a

80 percent of New Jobs (0.80 x number of new jobs based on the qualified property in the year covered by this report.) ..... nil



What is the minimum required annual wage for each qualifying job in the year covered by the report? .....

n/a

For agreements executed prior to June 19, 2009, please identify which of the two Tax Code sections is used to determine the wage standard required by the agreement: §313.021(5)(A) or §313.051(b). For agreements executed after June 19, 2009, please identify which of the four Tax Code sections is used to determine the wage standard required by the agreement: §313.021(5)(A), §313.021(5)(B), §313.021(3)(E)(ii), or §313.051(b). .....

n/a

Attach calculations and cite (or attach) exact Texas Workforce Commission data sources. ....

n/a

How many qualifying jobs (employees of this entity and employees of a contractor with this entity) were based on the qualified property in the year covered by the report? .....

nil

Of the qualifying job-holders last year, how many were employees of the approved applicant? .....

n/a

Of the qualifying job-holders last year, how many were employees of an entity contracting with the approved applicant? .....

n/a

If any qualifying job-holders were employees of an entity contracting with the applicant, does the approved applicant or assignee have documentation from the contractor supporting the conclusion that those jobs are qualifying jobs? ....

☒ NA

☐ Yes

☐ No

**THE FOLLOWING QUESTIONS APPLY ONLY TO APPROVED APPLICANTS WITH AGREEMENTS THAT REQUIRE THE APPROVED APPLICANT TO PROVIDE A SPECIFIED NUMBER OF JOBS AT A SPECIFIED WAGE.**

How many qualifying jobs did the approved applicant commit to create in the year covered by the report? .....

nil

At what annual wage? .....

n/a

How many qualifying jobs were created at the specified wage? .....

nil

**ENTITIES ARE NOT REQUIRED TO ANSWER THE FOLLOWING FIVE QUESTIONS IF THE YEAR COVERED BY THE REPORT IS AFTER THE QUALIFYING TIME PERIOD OF THEIR AGREEMENT.**

What is the qualified investment expended by this entity from the beginning of the qualifying time period through the end of the year covered by this report? .....

nil

Was any of the land classified as qualified investment? .....

☐ Yes

☐ No

Was any of the qualified investment leased under a capitalized lease? .....

☐ Yes

☒ No

Was any of the qualified investment leased under an operating lease? .....

☐ Yes

☒ No

Was any property not owned by the applicant part of the qualified investment? .....

☐ Yes

☒ No

**THE FOLLOWING QUESTIONS MUST BE ANSWERED BY ENTITIES HAVING A PARTIAL INTEREST IN AN AGREEMENT.**

What was your limitation amount (or portion of original limitation amount) during the year covered by this report? .....

Please describe your interest in the agreement and identify all the documents creating that interest.

NOTE: For job definitions see TAC §9.1051(14) and Tax Code, §313.021(3). If the agreement includes a definition of "new job" other than TAC §9.1051(14)(C), then please provide the definition "new job" as used in the agreement.

Notwithstanding any waiver by the district of the requirement for the creation of a minimum number of new jobs, or any other job commitment in the agreement, Tax Code 313.024(d) requires that 80 percent of all new jobs be qualifying jobs.

**APPROVAL**

"I am the authorized representative for the Company submitting this Annual Eligibility Report. I understand that this Report is a government record as defined in Chapter 37 of the Texas Penal Code. ☐ The information I am providing on this Report is true and correct to the best of my knowledge and belief."

Signature

Printed Name of Authorized Company Representative

RON HEALEY

Title

TREASURER

Date

5/27/15

**CONTACT INFORMATION FOR AUTHORIZED REPRESENTATIVE**

Address

6 DENNY ROAD, SUITE 200 WILMINGTON, DE 19809

Phone

302 764 3100 x 3260

Email

RON.HEALEY@IKO.COM



# Chapter 313 Annual Eligibility Report Form

Economic Development  
and Analysis  
**Form 50-772-A**

## SECTION 1: Applicant and District Information

1. Tax year covered by this report: \_\_\_\_\_  
**NOTE:** This report must be completed and submitted to the school district by May 15 of every year using information from the previous tax (calendar) year.
2. Application number: \_\_\_\_\_  
**NOTE:** You can find your application number and all agreement documents and reports on the website [www.texasahead.org/tax\\_programs/chapter313/applicants](http://www.texasahead.org/tax_programs/chapter313/applicants)
3. Name of school district: \_\_\_\_\_
4. Name of project on original application (*or short description of facility*): \_\_\_\_\_
5. Name of applicant on original application: \_\_\_\_\_
6. Name the company entering into original agreement with district: \_\_\_\_\_
7. Amount of limitation at time of application approval: \_\_\_\_\_
8. If you are one of two or more companies originally applying for a limitation, list all other applicants here and describe their relationships.  
(*Use attachments if necessary.*)

## SECTION 2: Current Agreement Information

1. Name of current agreement holder(s) \_\_\_\_\_
2. Complete mailing address of current agreement holder \_\_\_\_\_
3. Company contact person for agreement holder:  

Name	Title
Phone	Email
4. Texas franchise tax ID number of current agreement holder: \_\_\_\_\_
5. If the current agreement holder does not report under the franchise tax law, please include name and tax ID of reporting entity:

Name	Tax ID
------	--------

6. If the authorized company representative (*same as signatory for this form*) is different from the contact person listed above, complete the following:

Name	Title
------	-------

Complete Mailing Address

Phone	Email
-------	-------

7. If you are a current agreement holder who was not an original applicant, please list all other current agreement holders. Please describe the chain of ownership from the original applicant to the new entities. (*Use attachments if necessary.*)

### SECTION 3: Applicant Eligibility Information

1. Does the business entity have the right to transact business with respect to Tax Code, Chapter 171?  
(Attach printout from Comptroller Web site: <http://www.window.state.tx.us/taxinfo/coasintr.html>) ..... ☐ Yes ☐ No
2. Is the business entity current on all taxes due to the State of Texas? ..... ☐ Yes ☐ No
3. Is the business activity of the project an eligible business activity under Section 313.024(b)? ..... ☐ Yes ☐ No

3a. Please identify business activity: \_\_\_\_\_

### SECTION 4: Qualified Property Information

1. Market value for reporting year: ..... \$ \_\_\_\_\_
2. I&S taxable value for reporting year: ..... \$ \_\_\_\_\_
3. M&O taxable value for reporting year: ..... \$ \_\_\_\_\_

### SECTION 5A: Wage and Employment Information for Applications Prior to Jan. 1, 2014 (#1 Through 999)

**ONLY COMPLETE THE WAGE SECTION (5A or 5B) THAT APPLIES TO YOUR APPLICATION. You can find your application number on the website at [www.texasahead.org/tax\\_programs/chapter313/applications](http://www.texasahead.org/tax_programs/chapter313/applications)**

This section does not apply to IKO

**NOTE:** All statutory references in Section 5A are for statute as it existed prior to Jan. 1, 2014. For job definitions see TAC §9.1051(14) and Tax Code, §313.021(3). If the agreement includes a definition of "new job" other than TAC §9.1051(14)(C), then please provide the definition "new job" as used in the agreement. Notwithstanding any waiver by the district of the requirement for the creation of a minimum number of new jobs, or any other job commitment in the agreement, Tax Code §313.024(d) requires that 80 percent of all new jobs be qualifying jobs.

1. How many new jobs were based on the qualified property in the year covered by this report? (See note above) ..... \_\_\_\_\_
2. What is the number of new jobs required for a project in this school district according to §313.021(2)(A)(iv)(b), §313.051(b), as appropriate? ..... \_\_\_\_\_
3. Did the applicant request that the governing body waive the minimum job requirement, as provided under Tax Code §313.025(f-1)? ..... ☐ Yes ☐ No

3a. If yes, how many new jobs must the approved applicant create under the waiver? ..... \_\_\_\_\_

4. Calculate 80 percent of new jobs (0.80 x number of new jobs based on the qualified property in the year covered by this report.) ..... \_\_\_\_\_

5. What is the minimum required annual wage for each qualifying job in the year covered by the report? ..... \$ \_\_\_\_\_

6. Identify which of the four Tax Code sections is used to determine the wage standard required by the agreement:

☐ §313.021(5)(A) or ☐ §313.021(5)(B) or ☐ §313.021(3)(E)(ii) or ☐ §313.051(b)

6a. Attach calculations and cite exact Texas Workforce Commission data source as defined in TAC §9.1051.

7. Does the agreement require the applicant to provide a specified number of jobs at a specified wage? ..... ☐ Yes ☐ No

7a. If yes, how many qualifying jobs did the approved applicant commit to create in the year covered by the report? ..... \_\_\_\_\_

7b. If yes, what annual wage did the approved applicant commit to pay in the year covered by the report? ..... \$ \_\_\_\_\_

7c. If yes, how many qualifying jobs were created at the specified wage in the year covered by the report? ..... \_\_\_\_\_

8. How many qualifying jobs (employees of this entity and employees of a contractor with this entity) were based on the qualified property in the year covered by the report? ..... \_\_\_\_\_

8a. Of the qualifying job-holders last year, how many were employees of the approved applicant? ..... \_\_\_\_\_

8b. Of the qualifying job-holders last year, how many were employees of an entity contracting with the approved applicant? ..... \_\_\_\_\_

8c. If any qualifying job-holders were employees of an entity contracting with the applicant, does the approved applicant or assignee have documentation from the contractor supporting the conclusion that those jobs are qualifying jobs? ..... ☐ Yes ☐ No ☐ N/A

**SECTION 5B: Wage and Employment Information for Applications After Jan. 1, 2014 (#1000 and Above)**

**ONLY COMPLETE THE WAGE SECTION (5A or 5B) THAT APPLIES TO YOUR APPLICATION. You can find your application number on the website at [www.texasahead.org/tax\\_programs/chapter313/applicants](http://www.texasahead.org/tax_programs/chapter313/applicants).**

**NOTE:** For job definitions see TAC §9.1051(14) and Tax Code, §313.021(3).

**did not commit to  
any for 2014**

**QUALIFYING JOBS**

1. What is the number of new qualifying jobs the applicant committed to create in the year covered by this report? . . . . . \_\_\_\_\_
2. Did the applicant request that the governing body waive the minimum qualifying job requirement, as provided under Tax Code §313.025(f-1)? . . . . . ☐ Yes ☐ No
  - 2a. If yes, how many new qualifying jobs must the approved applicant create under the waiver? . . . . . \_\_\_\_\_
3. Which Tax Code section are you using to determine the wage standard required for this project? . . . . ☐ §313.021(5)(A) or ☐ §313.021(5)(B)
  - 3a. Attach calculations and cite exact Texas Workforce Commission data sources as defined in TAC §9.1051.
4. What is the minimum required annual wage for each qualifying job in the year covered by this report? . . . . . \$ \_\_\_\_\_
5. What is the annual wage the applicant committed to pay for each of the qualifying jobs in the year covered by this report? . . . . . \$ \_\_\_\_\_
6. Do the qualifying jobs meet all minimum requirements set out in Tax Code §313.021(3)? . . . . . ☐ Yes ☐ No

**NON-QUALIFYING JOBS**

7. What is the number of non-qualifying jobs the applicant had on Dec. 31 of the year covered by this report? . . . . . \_\_\_\_\_
8. What was the average wage you were paying for non-qualifying jobs on Dec. 31 of the year covered by this report? . . \$ \_\_\_\_\_
9. What is the county average weekly wage for non-qualifying jobs, as defined in TAC §9.1051? . . . . . \$ \_\_\_\_\_

**MISCELLANEOUS**

10. Did the applicant rely on a determination by the Texas Workforce Commission under the provisions §313.024(3)(F) in meeting the minimum qualifying job requirements? . . . . . ☐ Yes ☐ No
  - 10a. If yes, attach supporting documentation to evidence that the requirements of §313.021(3)(F) were met.
11. Are you part of a Single Unified Project (SUP) and relying on the provisions in Tax Code §313.024(d-2) to meet the qualifying job requirements? . . . . . ☐ Yes ☐ No
  - 11a. If yes, attach supporting documentation from the Texas Economic Development and Tourism Office including a list of the other school district(s) and the qualifying jobs located in each.

**SECTION 6: Qualified Investment During Qualified Time Period**

ENTITIES ARE NOT REQUIRED TO COMPLETE THIS SECTION IF THE YEAR COVERED BY THE REPORT IS AFTER THE QUALIFYING TIME PERIOD OF THEIR AGREEMENT.

1. What is the qualified investment expended by this entity from the beginning of the qualifying time period through the end of the year covered by this report? . . . . . \$ \_\_\_\_\_
2. Was any of the land classified as qualified investment? . . . . . ☐ Yes ☐ No
3. Was any of the qualified Investment leased under a capitalized lease? . . . . . ☐ Yes ☐ No
4. Was any of the qualified Investment leased under an operating lease? . . . . . ☐ Yes ☐ No
5. Was any property not owned by the applicant part of the qualified investment? . . . . . ☐ Yes ☐ No

## SECTION 7: Partial Interest

THE FOLLOWING QUESTIONS MUST BE ANSWERED BY ENTITIES HAVING A PARTIAL INTEREST IN AN AGREEMENT. For limitation agreements where there are multiple company entities that receive a part of the limitation provided by the agreement: 1) each business entity not having a full interest in the agreement should complete a separate form for their proportionate share of required employment and investment information; and, 2) separately, the school district is required to complete an Annual Eligibility Report that provides for each question in this form a sum of the individual answers from reports submitted by each entity so that there is a cumulative Annual Eligibility Report reflecting the entire agreement.

1. What was your limitation amount (or portion of original limitation amount) during the year covered by this report? . . . \_\_\_\_\_
2. Please describe your interest in the agreement and identify all the documents creating that interest.

## SECTION 8: Approval

*"I am the authorized representative for the Company submitting this Annual Eligibility Report. I understand that this Report is a government record as defined in Chapter 37 of the Texas Penal Code. The information I am providing on this Report is true and correct to the best of my knowledge and belief."*

**print  
here** ➡

\_\_\_\_\_  
Print Name (Authorized Company Representative)

\_\_\_\_\_  
Title

**sign  
here** ➡

\_\_\_\_\_  
Signature (Authorized Company Representative)

\_\_\_\_\_  
Date

**print  
here** ➡

\_\_\_\_\_  
Print Name of Preparer (Person Who Completed the Form)

\_\_\_\_\_  
Phone



## Franchise Tax Account Status

As of: 06/13/2015 10:46:52 AM

**This Page is Not Sufficient for Filings with the Secretary of State**

IKO SOUTHWEST INC.	
Texas Taxpayer Number	32053745421
Mailing Address	1999 BRYAN ST STE 900 DALLAS, TX 75201-3140
Right to Transact Business in Texas	ACTIVE
State of Formation	DE
Effective SOS Registration Date	04/04/2014
Texas SOS File Number	0801970335
Registered Agent Name	C T CORPORATION SYSTEM
Registered Office Street Address	1999 BRYAN ST., STE. 900 DALLAS, TX 75201



IKO Southwest Inc.  
TAB 13 TO CHAPTER 313 APPLICATION

**HILL COUNTY**  
**CHAPTER 313 WAGE CALCULATION - ALL JOBS - ALL INDUSTRIES**

QUARTER	YEAR	AVG WEEKLY WAGES*	ANNUALIZED
FOURTH	2012	\$ 626	\$ 32,552
FIRST	2013	\$ 682	\$ 35,464
SECOND	2013	\$ 671	\$ 34,892
THIRD	2013	\$ 675	\$ 35,100
AVERAGE		\$ 664	\$ 34,502

**HILL COUNTY**  
**CHAPTER 313 WAGE CALCULATION - MANUFACTURING JOBS**

QUARTER	YEAR	AVG WEEKLY WAGES*	ANNUALIZED
FOURTH	2012	\$ 779	\$ 40,508
FIRST	2013	\$ 712	\$ 37,024
SECOND	2013	\$ 746	\$ 38,792
THIRD	2013	\$ 693	\$ 36,036
AVERAGE		\$ 733	\$ 38,090
X		110%	110%
		\$ 806	\$ 41,899

**CHAPTER 313 WAGE CALCULATION - REGIONAL WAGE RATE**










YEAR	AVG WEEKLY WAGES*	ANNUALIZED
2012	\$ 763	\$ 39,670
X	110%	110%
	\$ 839	\$ 43,637

\* SEE ATTACHED TWC DOCUMENTATION

## Quarterly Employment and Wages (QCEW)

[Back](#)

Page 1 of 1 (40 results/page)

 Year	 Period	 Area	 Ownership	 Division	 Level	 Ind Code	 Industry	 Avg Weekly Wages
2013	1st Qtr	Hill County	Total All	00	0	10	Total, All Industries	\$682
2013	2nd Qtr	Hill County	Total All	00	0	10	Total, All Industries	\$671
2013	3rd Qtr	Hill County	Total All	00	0	10	Total, All Industries	\$675
2012	4th Qtr	Hill County	Total All	00	0	10	Total, All Industries	\$626

## Quarterly Employment and Wages (QCEW)

[Back](#)

Page 1 of 1 (40 results/page)

Year	Period	Area	Ownership	Division	Level	Ind Code	Industry	Avg Weekly Wages
2012	1st Qtr	Hill County	Private	31	2	31-33	Manufacturing	\$713
2013	1st Qtr	Hill County	Private	31	2	31-33	Manufacturing	\$712
2012	2nd Qtr	Hill County	Private	31	2	31-33	Manufacturing	\$755
2013	2nd Qtr	Hill County	Private	31	2	31-33	Manufacturing	\$746
2012	3rd Qtr	Hill County	Private	31	2	31-33	Manufacturing	\$730
2013	3rd Qtr	Hill County	Private	31	2	31-33	Manufacturing	\$693
2012	4th Qtr	Hill County	Private	31	2	31-33	Manufacturing	\$779

**2012 Manufacturing Wages by Council of Government Region**  
**Wages for All Occupations**

COG	Wages	
	Hourly	Annual
<b>Texas</b>	<b>\$23.56</b>	<b>\$48,996</b>
<a href="#"><u>1. Panhandle Regional Planning Commission</u></a>	\$20.12	\$41,850
<a href="#"><u>2. South Plains Association of Governments</u></a>	\$16.18	\$33,662
<a href="#"><u>3. NORTEX Regional Planning Commission</u></a>	\$17.83	\$37,076
<a href="#"><u>4. North Central Texas Council of Governments</u></a>	\$24.68	\$51,333
<a href="#"><u>5. Ark-Tex Council of Governments</u></a>	\$16.84	\$35,032
<a href="#"><u>6. East Texas Council of Governments</u></a>	\$19.61	\$40,797
<a href="#"><u>7. West Central Texas Council of Governments</u></a>	\$18.24	\$37,941
<a href="#"><u>8. Rio Grande Council of Governments</u></a>	\$16.17	\$33,631
<a href="#"><u>9. Permian Basin Regional Planning Commission</u></a>	\$21.93	\$45,624
<a href="#"><u>10. Concho Valley Council of Governments</u></a>	\$16.33	\$33,956
<a href="#"><u>11. Heart of Texas Council of Governments</u></a>	<b>\$19.07</b>	<b>\$39,670</b>
<a href="#"><u>12. Capital Area Council of Governments</u></a>	\$26.03	\$54,146
<a href="#"><u>13. Brazos Valley Council of Governments</u></a>	\$16.55	\$34,424
<a href="#"><u>14. Deep East Texas Council of Governments</u></a>	\$16.20	\$33,698
<a href="#"><u>15. South East Texas Regional Planning Commission</u></a>	\$29.38	\$61,118
<a href="#"><u>16. Houston-Galveston Area Council</u></a>	\$26.59	\$55,317
<a href="#"><u>17. Golden Crescent Regional Planning Commission</u></a>	\$21.03	\$43,742
<a href="#"><u>18. Alamo Area Council of Governments</u></a>	\$18.40	\$38,280
<a href="#"><u>19. South Texas Development Council</u></a>	\$13.54	\$28,170
<a href="#"><u>20. Coastal Bend Council of Governments</u></a>	\$22.97	\$47,786
<a href="#"><u>21. Lower Rio Grande Valley Development Council</u></a>	\$16.33	\$33,961
<a href="#"><u>22. Texoma Council of Governments</u></a>	\$22.57	\$46,949
<a href="#"><u>23. Central Texas Council of Governments</u></a>	\$17.16	\$35,689
<a href="#"><u>24. Middle Rio Grande Development Council</u></a>	\$18.93	\$39,380

Source: Texas Occupational Employment and Wages

Data published: July 2013

Data published annually, next update will be July 31, 2014

Note: Data is not supported by the Bureau of Labor Statistics (BLS).

Wage data is produced from Texas OES data, and is not to be compared to BLS estimates.

Data intended for TAC 313 purposes only.