

Chapter 313 Annual Eligibility Report Form

SECTION 1: Applicant and District Information

1. Tax year covered by this report: 2016
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: 258
NOTE: You can find your application number and all agreement documents and reports on the website comptroller.texas.gov/economy/local/ch313/agreement-docs.php
3. Name of school district: Red Oak Independent School District
4. Name of project on original application (or short description of facility): Triumph Aerostructures, LLC
5. Name of applicant on original application: Triumph Aerostructures, LLC
6. Name the company entering into original agreement with district: Triumph Aerostructures, LLC
7. Amount of limitation at time of application approval: \$80,000,000.00
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.)

N/A

SECTION 2: Current Agreement Information

1. Name of current agreement holder(s) Triumph Aerostructures, LLC
2. Complete mailing address of current agreement holder 1401 Nolan Ryan Expy #300, Arlington, TX 76011
3. Company contact person for agreement holder:
- | | |
|----------------------------|----------------------------------|
| <u>John C. Casper</u> | <u>Vice President, Finance</u> |
| Name | Title |
| <u>817-804-9400 x 5440</u> | <u>jccasper@triumphgroup.com</u> |
| Phone | Email |
4. Texas franchise tax ID number of current agreement holder: 32042042732
5. If the current agreement holder does not report under the franchise tax law, please include name and tax ID of reporting entity:
- | | |
|------------|------------|
| <u>N/A</u> | <u>N/A</u> |
| 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:
- | | |
|--------------------------|------------|
| <u>N/A</u> | <u>N/A</u> |
| Name | Title |
| <u>N/A</u> | |
| Complete Mailing Address | |
| <u>N/A</u> | <u>N/A</u> |
| 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.)

N/A

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 website: <https://mycpa.cpa.state.tx.us/coal/>) See Attach A ☒ 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
- a) 3a. Please identify business activity: manufacturing

SECTION 4: Market Value and Limitation Amount

Please identify the county appraisal district (CAD) in which the project is located: Ellis County

If the project is located in more than one CAD, please identify the name(s) of the other CADs and provide on a separate sheet for each CAD, the responses to items 1 through 5 applicable to the property (or portion of property) that is reflected in each CAD's property tax account records.

For purposes of item 1, "total market value" should reflect the market value as determined by the CAD (and as adjusted after protest) for only eligible property in all of the CAD property tax accounts covered by the 313 agreement in that county. Please note: "qualified property" is defined by Tax Code section 313.021(2) and 34 Tex. Admin. Code § 9.1051(16) and identified in the executed Chapter 313 agreement.

1. Total market value of all qualified property from all CAD property accounts subject to the 313 agreement \$ 129116540
2. Total value of all applicable exemptions for the qualified property included in item 1 \$ 0
3. Total taxable value for school I&S tax purposes for the qualified property (Item 1 less Item 2) \$ 129116540
4. Limitation amount on appraised value specified as qualified in the 313 agreement \$ 80000000
5. Total taxable value for school M&O tax purposes for the qualified property (lesser of item 3 or item 4) \$ 80000000

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 comptroller.texas.gov/economy/local/ch313/agreement-docs.php

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) 58
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? 25
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.) 46
5. What is the minimum required annual wage for each qualifying job in the year covered by the report? \$ 55,598.40
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. See Attach B
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? 28
- 7b. If yes, what annual wage did the approved applicant commit to pay in the year covered by the report? \$ 55,598.40

- 7c. If yes, how many qualifying jobs were created at the specified wage in the year covered by the report? 54
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? 54
- 8a. Of the qualifying job-holders last year, how many were employees of the approved applicant? 54
- 8b. Of the qualifying job-holders last year, how many were employees of an entity contracting with the approved applicant? N/A
- 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 comptroller.texas.gov/economy/local/ch313/agreement-docs.php.

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

QUALIFYING JOBS

1. What is the number of new qualifying jobs the applicant committed to create in the year covered by this report? N/A
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? N/A
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? \$ N/A
5. What is the annual wage the applicant committed to pay for each of the qualifying jobs in the year covered by this report? \$ N/A
6. 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? N/A
- 6a. Of the qualifying job-holders last year, how many were employees of the approved applicant? N/A
- 6b. Of the qualifying job-holders last year, how many were employees of an entity contracting with the approved applicant? N/A
- 6c. 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
7. Do the qualifying jobs meet all minimum requirements set out in Tax Code §313.021(3) and TAC 9.1051(30)? ☐ Yes ☐ No

NON-QUALIFYING JOBS

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

MISCELLANEOUS

11. 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
- 11a. If yes, attach supporting documentation to evidence that the requirements of §313.021(3)(F) were met.
12. 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
- 12a. 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? \$ N/A
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? N/A
2. Please describe your interest in the agreement and identify all the documents creating that interest.

N/A

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

John C. Casper

Print Name (Authorized Company Representative)

Vice President, Finance

Title

sign
here


Signature (Authorized Company Representative)

Date

October 25, 2017

print
here

Gary Constantine

Print Name of Preparer (Person Who Completed the Form)

817-804-8400 x 5091

Phone



Franchise Tax Account Status

As of : 10/13/2017 17:21:50

This Page Is Not Sufficient for Filings with the Secretary of State

TRIUMPH AEROSTRUCTURES, LLC	
Texas Taxpayer Number	32042042732
Mailing Address	1401 NOLAN RYAN 300 ARLINGTON, TX 76011-0000
Ⓢ Right to Transact Business in Texas	ACTIVE
State of Formation	DE
Effective SOS Registration Date	06/11/2010
Texas SOS File Number	0801281114
Registered Agent Name	CORPORATION SERVICE COMPANY D/B/A CSC-LAWYERS INCO
Registered Office Street Address	211 E. 7TH STREET SUITE 620 AUSTIN, TX 78701

Attach. A

Quarterly Employment and Wages (QCEW)

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Year	Period	Area	Ownership	Division	Level	Ind Code	Industry	Avg Weekly Wages
2012	1st Qtr	Elisa County	Private	31	2	31-33	Manufacturing	\$888
2012	2nd Qtr	Elisa County	Private	31	2	31-33	Manufacturing	\$881
2011	3rd Qtr	Elisa County	Private	31	2	31-33	Manufacturing	\$1,885
2011	4th Qtr	Elisa County	Private	31	2	31-33	Manufacturing	\$844
								<u>\$3,888.00</u>
								÷ 4
								\$ 972.00
								x 110%
								<u>\$1,069.20</u>

Attach. B 1 of 3

Count # Qual&NonQual Employees	Count # Qual Employees	Recent Hire/Txfr Date	Job Start Reason	Total Comp	New / Replacement	Minimum Annual Wage	Qualified vs Non-Qualified	Notes
1		10/19/2015	New hire	\$51,117	New	\$55,598	Non-Qualified	New - Oct 2015
2		4/20/2015	New hire	\$52,925	New	\$55,598	Non-Qualified	New - Apr 2015
3		4/20/2015	New hire	\$54,162	New	\$55,598	Non-Qualified	New - Apr 2015
4		9/21/2015	New hire	\$54,982	New	\$55,598	Non-Qualified	New - Sep 2015
5	1	2/10/2014	Transfer	\$55,816	Transfer	\$55,598	Qualified	Transfer from Grand Prairie
6	2	1/6/2014	New hire	\$56,323	Replacement	\$55,598	Qualified	New, Updated 2016 Comp changed employee to Qualified
7	3	1/19/2015	New hire	\$56,607	New	\$55,598	Qualified	New - Jan 2015
8	4	10/5/2015	New hire	\$57,907	New	\$55,598	Qualified	New - Oct 2015
9	5	10/5/2015	New hire	\$59,207	New	\$55,598	Qualified	New - Oct 2015
10	6	9/14/2015	New hire	\$59,727	New	\$55,598	Qualified	New - Sep 2015
11	7	5/18/2015	New hire	\$61,007	New	\$55,598	Qualified	New - May 2015
12	8	3/9/2015	New hire	\$64,407	New	\$55,598	Qualified	New - Mar 2015
13	9	2/2/2015	New hire	\$67,007	New	\$55,598	Qualified	New - Feb 2015
14	10	12/1/2014	New hire	\$70,023	New	\$55,598	Qualified	Replacement
15	11	6/2/2014	New hire	\$72,207	New	\$55,598	Qualified	New
16	12		Replacement	\$74,547	Replacement	\$55,598	Qualified	Replacement
17	13	1/27/2014	New hire	\$77,007	New	\$55,598	Qualified	Changed to salary on 12/22/14
18	14	1/27/2014	New hire	\$77,007	New	\$55,598	Qualified	Changed to salary on 12/22/14
19	15	8/22/2016	Replacement	\$79,019	Replacement	\$55,598	Qualified	Replacement
20	16	8/3/2015	New hire	\$79,487	New	\$55,598	Qualified	New - Aug 2015
21	17	3/3/2014	New hire	\$80,007	Replacement	\$55,598	Qualified	Terminated in Mar '17, Replaced
22	18	3/3/2014	New hire	\$82,607	New	\$55,598	Qualified	New
23	19	9/29/2014	New hire	\$82,607	New	\$55,598	Qualified	New
24	20	3/9/2015	New hire	\$82,607	New	\$55,598	Qualified	New - Mar 2015
25	21	6/22/2015	New hire	\$87,027	New	\$55,598	Qualified	New - Jun 2015
26	22	12/7/2015	Replacement	\$87,027	Replacement	\$55,598	Qualified	Replacement
27	23	6/23/2014	New hire	\$87,807	New	\$55,598	Qualified	New
28	24	8/17/2015	New hire	\$87,807	New	\$55,598	Qualified	New - Aug 2015
29	25	8/18/2014	New hire	\$90,007	New	\$55,598	Qualified	New
30	26	12/8/2014	New hire	\$90,007	Replacement	\$55,598	Qualified	Replacement
31	27	9/21/2015	Rehire	\$90,147	New	\$55,598	Qualified	New to this schedule in December.

Attach. B 2 of 3

Count # Qual&NonQual Employees	Count # Qual Employees	Recent Hire/Txfr Date	Job Start Reason	Total Comp	New / Replacement	Minimum Annual Wage	Qualified vs Non-Qualified	Notes
32	28	4/20/2015	New hire	\$90,667	New	\$55,598	Qualified	New - Apr 2015
33	29	3/9/2015	New hire	\$93,699	New	\$55,598	Qualified	New - Mar 2015
34	30	10/6/2014	Transfer	\$96,053	Transfer	\$55,598	Qualified	Transfer from Arlington
35	31	6/9/1997	Replacement	\$97,606	Replacement	\$55,598	Qualified	Replacement
36	32	8/25/2014	Transfer	\$99,491	Transfer	\$55,598	Qualified	Transfer from Arlington
37	33	7/20/2015	New hire	\$100,027	New	\$55,598	Qualified	New - Jul 2015
38	34	6/27/2016	Replacement	\$100,287	Replacement	\$55,598	Qualified	Replacement
39	35	8/3/2015	New hire	\$100,373	New	\$55,598	Qualified	New - Aug 2015
40	36	5/18/2015	New hire	\$104,007	New	\$55,598	Qualified	New - May 2015
41	37	4/20/2015	New hire	\$104,967	New	\$55,598	Qualified	New - Apr 2015
42	38	5/4/2015	New hire	\$106,007	New	\$55,598	Qualified	New - May 2015
43	39	12/1/2014	New hire	\$115,003	New	\$55,598	Qualified	Replacement
44	40	8/25/2014	Transfer	\$115,027	Transfer	\$55,598	Qualified	Transfer from Arlington
45	41	9/14/2015	New hire	\$120,007	New	\$55,598	Qualified	New - Sep 2015
46	42	6/8/2015	New hire	\$122,007	New	\$55,598	Qualified	New - Jun 2015
47	43	9/14/2015	New hire	\$122,007	New	\$55,598	Qualified	New - Sep 2015
48	44	3/25/2015	New hire	\$122,907	New	\$55,598	Qualified	New - Mar 2015
49	45	1/6/2014	New hire	\$127,007	Replacement	\$55,598	Qualified	Replacement
50	46	12/22/2014	Transfer	\$130,680	Transfer	\$55,598	Qualified	Terminated in Feb '17, Position not replaced as of Apr '17
51	47	1/6/2014	New hire	\$130,967	Replacement	\$55,598	Qualified	Replacement
52	48	7/25/2016	Replacement	\$143,007	Replacement	\$55,598	Qualified	Replacement
53	49	12/1/2014	New hire	\$144,487	New	\$55,598	Qualified	New
54	50	10/26/2015	Replacement	\$157,007	Replacement	\$55,598	Qualified	New - Oct 2015
55	51	7/1/1985	Replacement	\$172,007	Replacement	\$55,598	Qualified	Replacement
56	52	11/24/2014	Transfer	\$177,007	Transfer	\$55,598	Qualified	Terminated in Feb '17, Replaced
57	53	2/9/2015	New hire	\$187,007	New	\$55,598	Qualified	New - Feb 2015
58	54	12/15/2015	Replacement	\$212,007	Replacement	\$55,598	Qualified	Replacement