



A Proactive Approach to Homestead Administration

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Who Are We?



TrueRoll

2018 Founded

2019 First Customer

2020 Built Team

2021 Best in Class

2022 +50 Customers

2023 +100 Customers

2024 +10m Properties Monitored



AMERICA'S
FASTEST
GROWING
PRIVATE
COMPANIES



STATESCOOP

What is TrueRoll?

TrueRoll monitors the **past, present, and future** of homestead eligibility

PAST

**Historical Review
of Homesteads**

PRESENT

**Vetting of New
Homestead Applications**

FUTURE

**Proactive Monitoring for
Eligibility Changes**



How do we do it?

Discovery

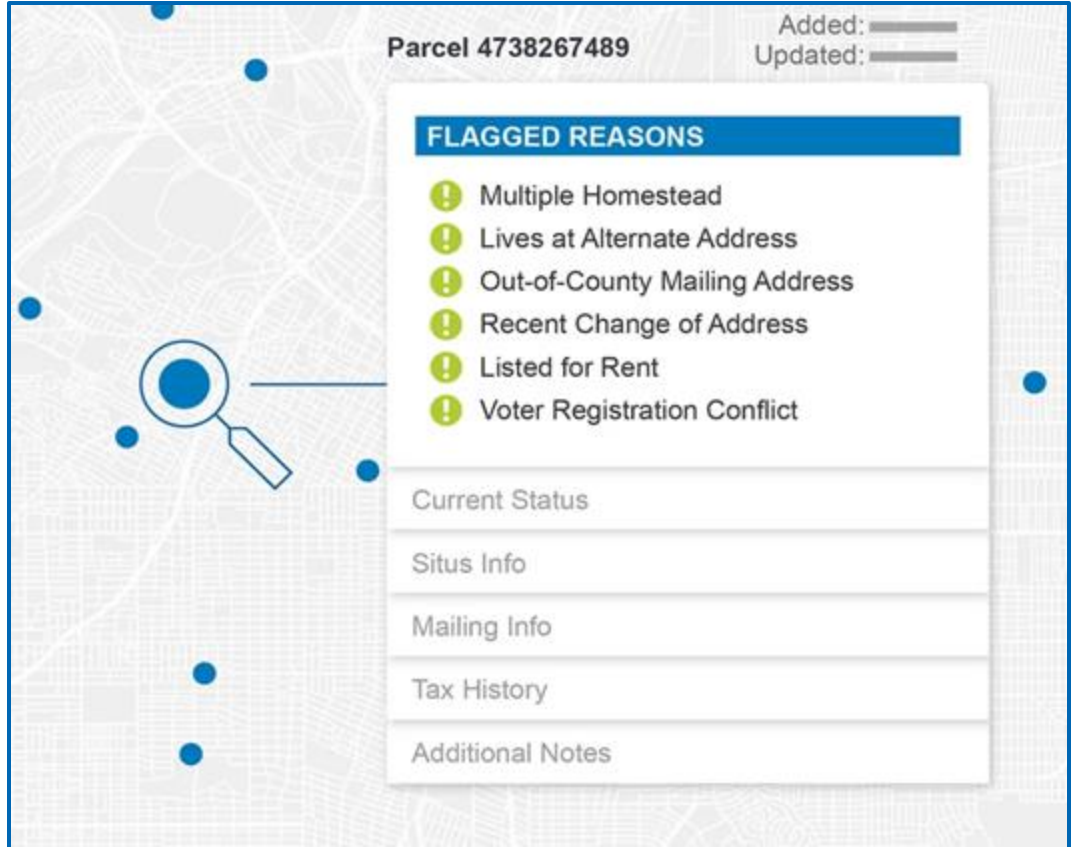
- Digest from CAMA
- New Applications
- 1000s of reference datasets
- Intelligent matching rules
- Prioritization



How do we do it?

Proactive

- Real time evidence
- Organized Data
- Actionable Results



Parcel 4738267489

Added:

Updated:

FLAGGED REASONS

- ! Multiple Homestead
- ! Lives at Alternate Address
- ! Out-of-County Mailing Address
- ! Recent Change of Address
- ! Listed for Rent
- ! Voter Registration Conflict

Current Status

Situs Info

Mailing Info

Tax History

Additional Notes



How do we do it?

Workflows

- Bulk actions
- Mail Templates
- Easy to use
- Web based

Update +Flags +Labels +Docs Mail TrueReview

Updating a Candidate Queue allows you to track details and status changes that align with your office's workflow.

Queue:

Reason:

Move the Candidate to UNQUALIFIED if the exemption needs to be removed, denied for a future year, and/or billed for previous years.

Unqualified Start Yr:

Lien or Back Taxes?:

Mailing Template:

Add Note

UPDATE



Wrapping Up

- ✓ Proactively notify taxpayers when life events happen.
- ✓ Eliminate the need for “penalty driven” audits, forever.
- ✓ Pre-qualify those taxpayers who are eligible for exemptions.
- ✓ Streamline **new application** process.
- ✓ Simplify and organize **homestead administration**.



Thank you

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