

SPECIAL-CIRCUMSTANCES FUND — CLAIM FORM AND CLAIMS PROTOCOL

Wheeler v. Beatty, et al., No. 2416-CV25478 — Jackson County Reassessment Class Settlement

DEADLINE: Claims must be submitted or postmarked by December 3, 2026 (45 days after the Notice Date).

ABC1234567890



JOHN Q CLASSMEMBER
123 MAIN ST
APT 1
ANYTOWN, ST 12345

Claim Number: 1111111

PIN: a@b#c\$f%

PART I — CLAIM FORM

Who should use this form: Any Class Member who paid out-of-pocket **appraisal fees** or **legal fees** to challenge or respond to the 2023/2024 reassessment may seek reimbursement from the \$6,000,000 Special-Circumstances Fund. Claims are decided by an independent settlement administrator, not by Jackson County.

SECTION 1 — YOUR INFORMATION

Full name: _____

Current mailing address: _____

City / State / ZIP: _____

Phone: _____

Email (optional): _____

Address of the affected property: _____

Parcel number (if known): _____

SECTION 2 — YOUR EXPENSES

List each expense you seek to recover and attach documentation for each (see Part II, § 3, for examples of acceptable proof).

Type of expense	Paid to (provider)	Amount	Date(s) paid
☐ Appraisal fee ☐ Legal fee		\$	
☐ Appraisal fee ☐ Legal fee		\$	
☐ Appraisal fee ☐ Legal fee		\$	
☐ Appraisal fee ☐ Legal fee		\$	
☐ Appraisal fee ☐ Legal fee		\$	
TOTAL CLAIMED		\$	

Briefly describe how each expense related to challenging or responding to the reassessment (e.g., “hired appraiser for BOE appeal of 2023 valuation”):

SECTION 3 — ATTESTATION AND SIGNATURE

By signing below, I attest under penalty of perjury that: (1) I am a Class Member; (2) I actually paid the expenses listed above out of pocket; (3) each expense was incurred to challenge or respond to the 2023 and/or 2024 reassessment of the property identified above; (4) the attached documentation is genuine; and (5) I have not been, and will not be, reimbursed for these expenses from any other source.

Signature: _____

Printed Name: _____

Date Signed: _____

HOW TO SUBMIT

Mail this form to the Settlement Administrator at Analytics Consulting LLC, PO Box 2010, Chanhassen, MN 55317-2010 or JacksonCoPropertyTaxLawsuit@hfmlegal.com or submit it online at **www.jacksoncountypropertytaxclassaction.com**, Questions? Call **888-969-3783**, (toll-free). If your claim has a curable problem, the Administrator will notify you and give you at least 21 days to fix it. If your claim is denied, you may seek review within 14 days of the denial.

PART II — CLAIMS PROTOCOL (COURT-APPROVED)

1. **Purpose; Fund.** This Protocol governs claims against the \$6,000,000 Special-Circumstances Fund established under Article VI of the Settlement Agreement. The Administrator, not the County, decides claims. The County may provide records and identify suspected duplication or fraud but may not direct the outcome of any claim (Agreement § 6.7).
2. **Eligible claims.** Subject to documentation and causation, the Fund reimburses a Class Member's out-of-pocket: (a) **appraisal fees**; and (b) **legal fees** that were paid to challenge or respond to the 2023/2024 reassessment; and (c) contingent attorneys' fees pursuant to contingent fee agreements to challenge or respond to the assessment signed prior to July 8, 2026 (Agreement § 6.3). The Fund does not pay speculative, punitive, exemplary, emotional-distress, reputational, or duplicative damages (§ 6.4). There is no per-claim cap (§ 6.5).
3. **Acceptable proof.** Acceptable documentation includes, without limitation: invoices or engagement letters from an appraiser or attorney; receipts, cancelled checks, or bank/credit-card statements showing payment; an appraisal report reflecting the fee; or a provider's written confirmation of amounts paid. Equivalent reliable evidence is also acceptable; the Administrator shall not impose technical requirements that defeat otherwise valid claims (§ 4.4). Where records are unavailable, the Administrator may accept a detailed sworn statement corroborated by other reliable indicia.
4. **Deadline; late claims.** Claims must be submitted or postmarked by the Claim Deadline, 45 days after the Notice Date. The Administrator may accept a late claim for good cause before final distribution (§ 4.3).
5. **Deficiency notice and cure.** Before denying a timely claim for a curable deficiency, the Administrator will send written or electronic notice describing the deficiency and allow at least 21 days to cure (§§ 4.5, 6.8).
6. **Determinations; review.** The Administrator will determine claims in good faith under this Protocol and issue written determinations stating the basis for any denial and the review procedure. A claimant may seek review within 14 days; the Administrator will reconsider and issue a written decision. Unresolved legal or systemic disputes may be submitted to the Court; individual factual determinations are reviewed for abuse of discretion (§§ 4.6, 6.8).
7. **Fraud prevention.** The Administrator may deny a fraudulent or materially false claim after notice and an opportunity to respond. Good-faith mistakes are treated as curable deficiencies (§ 6.11).
8. **Payment; pro rata.** Payments issue as soon as reasonably practicable after the Effective Date and final determination of claims. If approved claims exceed the Fund, all approved claims are reduced pro rata, and payment may await resolution of all claims and reviews (§§ 6.5, 6.9).
9. **Remainder; accounting.** After all approved claims, reviews, taxes, and Fund-specific administration expenses are resolved and paid, any remainder reverts to the County, but only after the Administrator files a final accounting and the Court authorizes closure of the Fund (§ 6.10).
10. **Privacy.** Claim files and personal information will be used only for administration and will not be publicly filed except in redacted, aggregated, or sealed form as the Court approves (§§ 6.8, 7.10).