



Settlement Conference Brief Template

Prepared on behalf of:

Property information

Property Location(s) (include street address and city):

Property Owner (Assessed Person):

Roll Number(s):

Assessed Value:

This Settlement Conference Brief is to be served on the other parties and filed with the Board no later than the due date under the Schedule of Events for filing the Settlement Conference Brief.

Appeal information

Appeal Number(s):

Roll Number(s):

Legislative Authority: Section 40 of the *Assessment Act*, R. S. O. 1990, c. A.31, as amended

Valuation Date:

Parties (include representative for each party if applicable)

Appellant(s):

Respondent:

Respondent:

Added Party:



Property description

Provide a brief description summarizing the property characteristics that are relevant to the outstanding issues in dispute. Include property code and any changes to the Subject Property since the General Re-assessment.

Respondent who has not filed a response

Specify if any statutory party who is a respondent in this proceeding has not served a Statement of Response (“SOR”).

Persons who will be attending the Settlement Conference

Specify who will attend the Settlement Conference on behalf of each party filing this Settlement Conference Brief. Please attach a list of parties including all of the following information:

- Party
- Role (e.g. representative, expert witness, etc.)
- Name
- Phone number
- Email address
- Binding authority (for each party, state which person has unconditional binding authority to enter in a settlement)

Issues resolved

List each of the issues in the Statement of Issues and Response that have been resolved and provide a description of the resolution, (e.g. if the resolved issue is capitalization rate, state the agreed rate).

Issues outstanding

Describe specifically each of the issues in the Statement of Issues and Statements of Response that have not been resolved. For each issue, and for each party who is filing this Settlement Conference Brief, provide the following:

- Describe both facts and opinions that are in dispute;
- State the party’s current position on the issue;
- Outline the evidence on which the party relies in support of its position (be specific and if, for example, relying on a report, provide page numbers in the report)



Tribunals Ontario – Assessment Review Board

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- If the party has made a proposal for settlement at the Mandatory Meeting, a party may choose to include a description of that proposal. This description will assist the Board, but is not mandatory to include.
 - After completing the discussion of the Issues, state your final position (e.g. for s.40 appeal, correct current value is \$x).

Mandatory Meeting

Who attended the Mandatory Meeting(s)?

Information if a hearing is required

For each party who is filing this Settlement Conference Brief, provide the following:

- List of names of each witness who will testify on the party's behalf;
- For any witness who proposes to give opinion evidence, specify:
 - The specific qualification the party will request that the Board make; and
 - Whether any other party disputes this qualification
- Identify whether there are any specific procedural directions required.