

20-0238



Williams Tower
2800 Post Oak Boulevard
Suite 3700
Houston, TX 77056
Tel. 713.629.0090
Fax 713.629.0227

www.ryan.com

RECEIVED
FEB 3 - 2020
CITY CLERKS OFFICE

January 30, 2020

Manitowoc City Clerk
900 Quay Street
Manitowoc, WI 54220

To: Manitowoc City Clerk
From: Matt Arroyos
Subject: Aldi, Inc. (Wisconsin) Tax Year 2019 Recovery of Unlawful Taxes – 74.35 Wis Stats
Parcel Account: 000-309-666

To Whom It May Concern,

An amended Statement of Personal Property for tax year 2019 was mailed to the Assessor's Office on June 5th of last year on behalf of our client. The amended statement was filed to exclude exempt Machinery & Equipment and Computer assets that were previously reported on the initial statement filed with the Assessor's Office. However, the Assessor's office did not accept the amended statement. This claim is being filed with your office due to exempt property by law being taxed, Wisconsin Statute 74.33(1)(c). The amount of the claim being seek is \$629.95

We respectfully request this claim be accepted with the tax associated to the exempt Machinery & Equipment and Computer Assets be refund to our client.

Enclosed you will find copies of the both initial statement and amended statement, along with the cover letter mailed with the amended statement.

If there are any questions regarding this claim, please contact us at 866-866-4186 or via email at PTSCompliance@ryan.com.

Thank you for your assistance in this matter.

Sincerely,

A handwritten signature in black ink, appearing to read "Matt Arroyos".

Matt Arroyos
Senior Associate Consultant
Ryan Tax Compliance Services, LLC



ALDI Inc.

1200 NORTH KIRK ROAD
BATAVIA, IL 60510-1477

P: 630.879.8100
F: 630.879.9901

LETTER OF AUTHORIZATION FOR TAX REPRESENTATION

This letter serves as authorization for Ryan LLC and its affiliate Ryan Tax Compliance Services, LLC, to represent ALDI, Inc. in its affairs concerning all property tax matters for all parcels listed on the attached document. This includes, but is not limited to: filing property renditions, signing and filing of appeals, examining all property tax records, representation before the assessor, boards of equalization or review, and/or any other governmental agency responsible for the assessment of property.

This agency shall remain in effect until written notice of termination is issued by

ALDI Inc.

Ownership Entity

By:

[Signature]
AUTHORIZED SIGNATURE

Tim Byrd, Assistant Treasurer
PRINT NAME, TITLE

Dated this 8th day of January, 2020.



[Signature]

I certify that the signature above is a true and correct signature provided as a duly appointed officer of the above referenced company. If a copy of this completed form is being submitted, I will produce the original form with original signature upon request. If a completed application for changed assessment attached to this authorization, I certify that a copy has been forwarded to the applicant named in this application.

Ryan, LLC and its affiliate Ryan Tax Compliance Services, LLC

By:

[Signature]

Date:

1/8/20

Site Name: All Sites

Jurisdiction: All Jurisdictions

Due date
March 1, 2019

Statement of Personal Property
Assessment date – January 1, 2019

2019

Filing Instructions – you must file this completed return with your local assessor on or before March 1, 2019. (sec. 70.35, Wis. Stats.) Report personal property not reported to the Wisconsin Department of Revenue's Manufacturing & Utility Bureau.

Confidentiality – under sec. 70.35(3), Wis. Stats., personal property returns filed with the local assessor are confidential records of the assessor's office.

Failure to File – if you do not file, your local assessor will estimate your property's value using the best information available. You will also be denied appeal rights with the Board of Review (BOR), under state law (sec. 70.35(4), Wis. Stats.).

Questions? – if you have questions on filing this form, contact your local assessor.

Aldi Inc. (Wisconsin)
c/o Ryan Tax Compliance Services, LLC
PO Box 460049
Houston, TX 77056

For Office Use Only	
School district	TID no.
Assessor name	Manitowoc City Assessor
Assessor address	900 Quay St Manitowoc, WI 54220

Property Owner and Property Information (agent, consignee or other representative)

Property address: Aldi-Loc# 64034 4111 Harbor Town Lane
(if different from above)
Manitowoc, WI 54220-5855

Business type: Retail Grocer

Owner is: (check box that applies) Sole Proprietorship Partnership Corporation LLC LLP

New owner information – complete this section if there was a change in ownership or the business is no longer in operation.

Type of change: (check box that applies)

Discontinued Sold Incorporated Moved

Date of change: _____

FEIN 36-3498392 Account no. 000-309-666
NAICS code 445110 Town Village City
County _____ Municipality Manitowoc City

New owner name _____
Property address _____
Mailing address _____
Phone no. _____
Email _____

Preparer and Owner Information/Signature

I, the undersigned declare under penalties of law that I have personally examined this return and its completed schedules. To the best of my knowledge and belief, this return is true, correct and complete.

Preparer	Owner
Matt Arroyos	Aldi Inc. (Wisconsin)
Name (please print) c/o Ryan LLC	Name (please print) c/o Ryan Tax Compliance Services, LLC
Address Houston TX 77056	Address Houston TX 77056
Phone (888) 888-4186 Fax (800) 642-7889	Phone (888) 888-4186 Fax (972) 960-0613
Email ptscompliance@ryan.com	Email PTSCOMPLIANCE@RYAN.COM
Signature <i>Matt Arroyos</i> Date 02/11/2019	Signature _____ Date 02/11/2019

Schedule A – Personal Property Return (Assessment Summary as of January 1, 2019)

This schedule summarizes all taxable personal property from Schedules B through H. Line 10, Col. 3 is the total value of your taxable personal property within this municipality.

Col. 1 Property Type	Col. 2 Subtotal	Col. 3 Total	For Office Use Only	
			Class	Col. 4
1. Boats and watercraft (from Sch. B)			1	
2. Furniture, fixtures and equipment (from Sch. D)	131,662			
3. Multifunction fax machines, copiers, postage meters ... (from Sch. D2)				
4. Total of lines 2, 3		131,662	3	
5. Building on leased land (from Sch. E)			4B	
6. Leased equipment (property in charge of but not owned) (from Sch. F)				
7. Supplies (from Sch. G)	400			
8. All other personal property (from Sch. H)	7,537			
9. Total of lines 6, 7, 8		7,937	4A	
10. Total assessable – add lines 1, 4, 5, 9		139,599		

Schedule B – Boats and Watercraft					2019
Report: All boats and watercraft subject to general property taxation. Review the <i>Composite Conversion Factors and Composite Useful Lives Table</i> on various equipment: http://www.revenue.wi.gov/Pages/Report/p.aspx#personal .					
Col. 1 Description of Boats and Watercraft	Col. 2 Acquisition Year	Col. 3 Original Cost	Col. 4 Conversion Factor	Col. 5 Declared Value January 1	Col. 6 For Office Use Only
Total declared value					
(Note: Attach additional sheets if needed)				Enter Col. 5 Total on Sch. A, Line 1, Col. 3	

Schedule C – Machinery, Tools and Patterns						2019
Report: All machinery and shop equipment. Use the costs from your accounting records. Summarize the original asset costs by acquisition year as of January 1 of last year. Enter these costs in Col. 2. Enter any additions or deletions by acquisition year in Col. 3.						
Col. 1 Acquisition Year	Col. 2 Total Original Cost as of Jan. 1, 2018	Col. 3 Additions, Disposals, Transfers at Cost Since Jan. 1, 2018	Col. 4 Net Total Original Cost as of Jan. 1, 2019 (Col. 2 +/- Col. 3)	Col. 5 Conversion Factor (10-yr)	Col. 6 Indexed Net Value (Full Value) on Jan. 1, 2019 (Col. 4 x Col. 5)	Col. 7 For Office Use Only
2018						
2017						
2016						
2015						
2014						
2013						
2012						
2011						
2010						
2009						
All prior years						
Total						

Do Not Report

Schedule D – Furniture, Fixtures and Equipment						2019
Report: All furniture, fixtures and equipment (e.g., office, store and professional furniture, fixtures and equipment, business and professional libraries, other assets related to the sales and administration of your business). Original Cost in Col. 4, should contain all costs of installation and freight, add-ons and sales tax.						
Col. 1 Acquisition Year	Col. 2 Total Original Cost as of Jan. 1, 2018	Col. 3 Additions, Disposals, Transfers at Cost Since Jan. 1, 2018	Col. 4 Net Total Original Cost as of Jan. 1, 2019 (Col. 2 +/- Col. 3)	Col. 5 Conversion Factor (10-yr)	Col. 6 Indexed Net Value (Full Value) on Jan. 1, 2019 (Col. 4 x Col. 5)	Col. 7 For Office Use Only
2018		12,657	12,657	.925	11,708	
2017		10,054	10,054	.786	7,902	
2016	16,905		16,905	.668	11,292	
2015	1,216		1,216	.574	698	
2014				.497		
2013	67,680		67,680	.426	28,832	
2012	1,818		1,818	.370	673	
2011	13,387		13,387	.318	4,257	
2010	245,555		245,555	.270	66,300	
2009				.238		
All prior years				.138		
Total	346,561	22,711	369,272		131,662	
					Enter Col. 6 Total on Sch. A, Line 2, Col. 2	

**Schedule D1 – Exempt Computer Equipment & Software (Owned),
Cash Registers & Single Function Fax Machines**

2019

- **Report:** Mainframe computers, minicomputers, personal computers, networked personal computers, servers, terminals, monitors, disk drives, electronic peripheral equipment, tape drives, printers, basic operational programs, systems software, prewritten software, ATMs, cash registers, and single function fax machines. Review the *Computer Exemption Guidelines for Assessors and Property Owners* (revenue.wi.gov/DOR%20Publications/compexqd.pdf).
- **Do not report:** Custom software
- **Note:** Per state law (sec. 70.36(1m), Wis. Stats.), any person, firm or corporation that fails to include information on exempt property under sec. 70.11(39) and sec. (39m) will owe \$10 for every \$100 or major fraction that is not reported (sec. 70.35, Wis. Stats.).

Col. 1 Acquisition Year	Col. 2 Total Original Cost as of Jan. 1, 2018	Col. 3 Additions, Disposals, Transfers at Cost Since Jan. 1, 2018	Col. 4 Net Total Original Cost as of Jan. 1, 2019 (Col. 2 +/- Col. 3)	Col. 5 Conversion Factor (4-yr)	Col. 6 Indexed Net Value (Full Value) on Jan. 1, 2019 (Col. 4 x Col. 5)	Col. 7 For Office Use Only
2018						
2017						
2016						
2015						
2014						
2013						
2012						
All prior years						
Total						
Total leased equipment from Sch. F, Col. 7						
Combined totals						

Do Not Report

**Schedule D2 – Multifunction Faxes, Copiers, Postage Meters, Telephone Systems,
and Computerized Equipment**

2019

Report: All multifunction fax machines, copiers, postage meters, telephone systems (PBXs), and equipment with embedded computerized components.

Col. 1 Acquisition Year	Col. 2 Total Original Cost as of Jan. 1, 2018	Col. 3 Additions, Disposals, Transfers at Cost Since Jan. 1, 2018	Col. 4 Net Total Original Cost as of Jan. 1, 2019 (Col. 2 +/- Col. 3)	Col. 5 Conversion Factor (6-yr)	Col. 6 Indexed Net Value (Full Value) on Jan. 1, 2019 (Col. 4 x Col. 5)	Col. 7 For Office Use Only
2018				.875		
2017				.656		
2016				.492		
2015				.373		
2014				.285		
2013				.216		
All prior years				.122		
Total						
Enter Col. 6 Total on Sch. A, Line 3, Col. 2						

Schedule E – Buildings on Leased Land

2019

Report: Buildings, structures and other improvements you own, but are located on land that you do not own. They are valued in the same manner as improvements located on land that is owned by you. Enter your opinion of value in Col. 4.

Col. 1 Property Description	Col. 2 Acquisition Year	Col. 3 Original Cost	Col. 4 Opinion of Value January 1	Col. 5 For Office Use Only
Total declared value				
Enter Col. 4 Total on Sch. A, Line 5, Col. 3				

Schedule F – Leased Equipment (Property in charge of but not owned)

2019

Report: All leased equipment (e.g., business furniture, fixtures, equipment, machines, postage meters, tools, advertising devices) and similar items loaned, leased, stored or otherwise held and not owned by you. These items may or may not be assessed to you. Often, leases state whether the owner or the lessee is responsible for the personal property taxes. Review the *Composite Conversion Factors and Composite Useful Lives* on various equipment: <http://www.revenue.wi.gov/Pages/Report/p.aspx#personal>.

Col. 1 Name and Address of Leasing Company*	Col. 2 Equipment Type and Lease No.	Col. 3 Gross Annual Rent	Col. 4 Installation Year	Col. 5 Original Cost	Col. 6 Indexed Value Taxable Equipment	Col. 7 For Office Use Only

* Leasing Companies: To avoid duplication of assessment, provide the same information requested on this schedule including name and location of lessees.

Totals

Enter Col. 6 Total on
Sch. A, Line 6, Col. 2

Schedule G – Supplies

2019

Report: Your supplies inventory. Report items that are in your possession on January 1 and are expensed and not subject to resale, but are necessary in the conduct of business and are consumed in the operations of providing customer services. **Supplies include:** Items used for selling and advertising, office, shipping, medical, dental, janitorial and cleaning

Supplies inventory – January 1, 2019 \$ 400

Enter amount on Sch. A, Line 7, Col. 2

Schedule H – All Other Personal Property, Leasehold Improvements, Signs, Billboards, Logs and Forest Products, Improvements on Exempt Land, Improvements on Forest Cropland or Managed Forestland

2019

Report: All leasehold improvements and other personal property not previously reported on other schedules. Report improvements on exempt land and privately owned structures, billboards, cable television towers or special taxed land. Review the *Composite Conversion Factors and Composite Useful Lives Table* on various equipment: <http://www.revenue.wi.gov/Pages/Report/p.aspx#personal>.

Leasehold improvements – any alterations, additions or improvements, adding value, made by a tenant to leased or rented premises. Enter the total improvement cost in Col. 3.

Include: Logs and other forest products belonging to persons whose principal activity is not related to the buying, selling or manufacturing that type of property

Exclude: Merchant's or manufacturing stock.

Col. 1 Acquisition Year	Col. 2 Property Description	Col. 3 Acquisition Cost	Col. 4 Conversion Factor	Col. 5 Declared Value January 1	Col. 6 For Office Use Only
	See Attached				
Total				7,537	

Lease or Asset Information

For each property you are leasing, provide the following: (attach additional sheets if necessary)

Enter Col. 5 Total
on Sch. A, Line 8, Col. 2

Property

Term	Start _____ End _____ (mm-yyyy) (mm-yyyy)	Square footage – leased area _____ Sq. Ft.	Annual base rent \$ _____ 0
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Sales/rent

If your sales are the basis for your rent, enter percentage of sales you pay as rent. _____ % Amount paid \$ _____

Rent includes: (check all that apply) Electric Heat Real estate taxes Parking Common area maintenance
 Other (describe)

Manitowoc City, WI
2019 Business Personal Property Tax Return - 000-309-666

Taxpayer: Aldi Inc. (Wisconsin)
FEIN: 36-3498392
Location ID: 64034
Account #: 000-309-666

Aldi-Loc# 64034
4111 Harbor Town Lane
Manitowoc, WI 54220-5855

Taxable - Detail

Form: Schedule D - Furniture, Fixtures and Office Equip **Depreciation: 10 YR Sched D**

Date Acq	Age	Asset ID	Asset Description	Cost	Dep Value	Asst Value
03-26-2018	1	500146389-0	FLOOR SCRUBBER ST	7,347	6,796	6,981
09-30-2018	1	500160323-0	18-Q3 USE TAX	859	795	816
11-25-2018	1	500171107-0	WIRELESS EQUIPEMENT	4,451	4,118	4,230
07-14-2017	2	500139248-0	SECURITY/ALARM SYSTEM-EAS	4,565	3,588	3,685
11-25-2017	2	500168415-0	SPOT MERCHANDISER	5,489	4,315	4,432
05-23-2016	3	500046364-0	SAFEPOINT	7,696	5,141	5,281
09-16-2016	3	500046535-0	STRADDLE STACKER	7,329	4,896	5,029
09-15-2016	3	500046742-0	SHELVING	1,880	1,256	1,290
05-26-2015	4	500046077-0	SAFE/TILL LOCKERS	1,216	698	717
06-27-2013	6	500045564-0	STRADDLE STACKER	7,410	3,157	3,243
07-07-2013	6	500045654-0	SHELVING	19,540	8,324	8,550
07-07-2013	6	500045730-0	MULTI DECK REACH IN	40,730	17,351	17,823
12-01-2012	7	500045204-0	DISPLAY TABLES	1,818	673	691
05-25-2011	8	500111521-0	SHOPPING CARTS	13,387	4,257	4,373
06-17-2010	9	500044286-0	MULTI DECK REACH IN	38,120	10,292	10,572
06-17-2010	9	500044288-0	SAFE AND SAFE BASE	5,414	1,462	1,502
06-17-2010	9	500044301-0	CHECKLANES	5,230	1,412	1,451
06-17-2010	9	500044302-0	CHECKLANES	5,230	1,412	1,451
06-17-2010	9	500044303-0	CHECKLANES	5,230	1,412	1,451
06-17-2010	9	500044304-0	CHECKLANES	5,230	1,412	1,451
06-17-2010	9	500044305-0	CHECKLANES	5,230	1,412	1,451
06-17-2010	9	500044306-0	SHELVING	35,305	9,532	9,792
06-17-2010	9	500044309-0	ELECTRIC POWER SAVING EQUIPMENT	35,558	9,601	9,862
06-17-2010	9	500044310-0	FLOOR SCRUBBER	6,646	1,794	1,843
06-17-2010	9	500044313-0	BALER	17,603	4,753	4,882
06-17-2010	9	500044315-0	STRADDLE STACKER	7,691	2,076	2,133
06-17-2010	9	500044327-0	SECURITY CAMERA SYSTEM	11,478	3,099	3,183
06-17-2010	9	500044337-0	COOLER FREEZER SHELVING	21,930	5,921	6,082
06-17-2010	9	500044339-0	SPOT MERCHANDISER	3,374	911	936
06-17-2010	9	500044340-0	SPOT MERCHANDISER	3,374	911	936
06-17-2010	9	500044341-0	SPOT MERCHANDISER	3,374	911	936
06-17-2010	9	500044342-0	SPOT MERCHANDISER	3,374	911	936
06-17-2010	9	500044343-0	SPOT MERCHANDISER	3,374	911	936
06-17-2010	9	500044344-0	SPOT MERCHANDISER	3,374	911	936
06-30-2010	9	500044346-0	ALARM SYSTEM	14,423	3,894	4,000
09-30-2010	9	500044363-0	MANAGED SWITCH & CABLING	3,953	1,067	1,096
10-31-2010	9	500044389-0	TIME CLOCKS	1,039	281	288
Form Subtotal:		37 Assets		369,272	131,662	135,243

Totals for Form: Furniture, Fixtures and Office Equip (Total of all assets subtotaled above in this form category)

2018	12,657	11,708	12,027
2017	10,054	7,902	8,117
2016	16,905	11,292	11,600
2015	1,216	698	717
2013	67,680	28,832	29,616
2012	1,818	673	691

**Manitowoc City, WI
2019 Business Personal Property Tax Return - 000-309-666**

Taxpayer:Aldi Inc. (Wisconsin)
FEIN:36-3498392
Location ID:64034
Account #:000-309-666

Aldi-Loc# 64034
4111 Harbor Town Lane
Manitowoc, WI 54220-5855

2011	13,387	4,257	4,373
2010	245,555	66,300	68,103
Total	369,272	131,662	135,243

Form: Schedule G - Supplies	Depreciation: Not Depreciated
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Date Acq	Age	Asset ID	Asset Description	Cost	Dep Value	Assd Value
12-31-2018	1	07566756297-000361	Supplies	400	400	411
Form Subtotal:				400	400	411

Totals for Form: Supplies	(Total of all assets subtotaled above in this form category)
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2018	400	400	411
Total	400	400	411

Form: Schedule H - Other PP	Depreciation: 10 YR Sched H
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Date Acq	Age	Asset ID	Asset Description	Cost	Dep Value	Assd Value
06-17-2010	9	500044282-0	SIGN-MONUMENT	2,945	810	832
05-31-2010	9	500044323-0	SIGN-PYLON	17,762	4,885	5,017
06-17-2010	9	500044338-0	SIGN-BUILDING	4,976	1,369	1,406
Form Subtotal:				25,684	7,063	7,255

Form: Schedule H - Other PP	Depreciation: 8 YR Sched H
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Date Acq	Age	Asset ID	Asset Description	Cost	Dep Value	Assd Value
05-20-2009	10	500044157-0	PALLET JACK-ELECTRIC	3,587	474	486
Form Subtotal:				3,587	474	486

Totals for Form: Other PP	(Total of all assets subtotaled above in this form category)
----------------------------------	---

2010	25,684	7,063	7,255
2009	3,587	474	486
Total	29,271	7,537	7,742

Totals for Taxable

Original Cost	Dep Value	Assd Value
398,943	139,599	143,396

* Percent Good is a composite of the percent good allowed and the trend factor if one is applicable

* Values may differ slightly from the return due to rounding issues

Add/Delete Amounts Included in Previous Section (Listed For Information Purposes Only)

Manitowoc City, WI
2019 Business Personal Property Tax Return - 000-309-666

Taxpayer: Aldi Inc. (Wisconsin)
FEIN: 36-3498392
Location ID: 64034
Account #: 000-309-666

Aldi-Loc# 64034
4111 Harbor Town Lane
Manitowoc, WI 54220-5855

Taxable-Add - Detail

Form: Schedule D - Furniture, Fixtures and Office Equip				Depreciation: 10 YR Sched D		
Date Acq	Age	Asset ID	Asset Description	Cost	Dep Value	Assd Value
03-26-2018	1	500146389-0	FLOOR SCRUBBER ST	7,347	6,796	6,981
09-30-2018	1	500160323-0	18-Q3 USE TAX	859	795	816
11-25-2018	1	500171107-0	WIRELESS EQUIPEMENT	4,451	4,118	4,230
07-14-2017	2	500139248-0	SECURITY/ALARM SYSTEM-EAS	4,565	3,588	3,685
11-25-2017	2	500168415-0	SPOT MERCHANDISER	5,489	4,315	4,432
Form Subtotal:			5 Assets	22,711	19,610	20,144

Totals for Taxable-Add			
Cost	Dep Value	Assessed Value	
22,711	19,610	20,144	

* Percent Good is a composite of the percent good allowed and the trend factor if one is applicable
 * Values may differ slightly from the return due to rounding issues
 2.1



Williams Tower
2800 Post Oak Boulevard
Suite 3700
Houston, TX 77056
Tel. 713.629.0090
Fax 713.629.0227

www.ryan.com

June 03, 2019

To: Property Tax Assessor
From: Matt Arroyos
Subject: Aldi, Inc. (Wisconsin) Tax Year 2019 Amended Statement of Personal Property

To Whom It May Concern,

Enclosed please find an amended Statement of Personal Property for tax year 2019 that is being submitted on behalf of our client. The enclosed amended return is being filed to exclude exempt Machinery & Equipment and Computer assets that were previously reported on the initial Statement filed with your office.

We respectfully request the amended Statement of Personal Property be accepted and the tax year 2019 assessed value be updated based on the enclosed amended return.

If there are any questions regarding the amended tax year 2019 Statement of Personal Property, please contact us at 866-866-4186 or via email at PTSCompliance@ryan.com.

Thank you for your assistance in this matter.

Sincerely,

A handwritten signature in black ink that reads "Matt Arroyos". The signature is written in a cursive, flowing style.

Matt Arroyos
Associate Consultant
Ryan Tax Compliance Services, LLC

Amended Return

Due date
March 1, 2019

Statement of Personal Property
Assessment date – January 1, 2019

2019

Filing Instructions – you must file this completed return with your local assessor on or before March 1, 2019. (sec. 70.35, Wis. Stats.) Report personal property not reported to the Wisconsin Department of Revenue's Manufacturing & Utility Bureau.

Confidentiality – under sec. 70.35(3), Wis. Stats., personal property returns filed with the local assessor are confidential records of the assessor's office.

Failure to File – if you do not file, your local assessor will estimate your property's value using the best information available. You will also be denied appeal rights with the Board of Review (BOR), under state law (sec. 70.35(4), Wis. Stats.).

Questions? – if you have questions on filing this form, contact your local assessor.

Aldi Inc. (Wisconsin)
c/o Ryan Tax Compliance Services, LLC
PO Box 460049
Houston, TX 77056

For Office Use Only	
School district	TID no.
Assessor name	Manitowoc City Assessor
Assessor address	900 Quay St Manitowoc, WI 54220

Property Owner and Property Information (agent, consignee or other representative)

Property address: Aldi-Loc# 64034 4111 Harbor Town Lane <i>(if different from above)</i> Manitowoc, WI 54220-5855		FEIN 36-3498392	Account no. 000-309-666		
Business type: Retail Grocer	NAICS code 445110	<input type="checkbox"/> Town	<input type="checkbox"/> Village	<input checked="" type="checkbox"/> City	
Owner is: (check box that applies)	<input type="checkbox"/> Sole Proprietorship	<input type="checkbox"/> Partnership	<input checked="" type="checkbox"/> Corporation	<input type="checkbox"/> LLC	<input type="checkbox"/> LLP
New owner information – complete this section if there was a change in ownership or the business is no longer in operation.		New owner name _____			
Type of change: (check box that applies)		Property address _____			
<input type="checkbox"/> Discontinued <input type="checkbox"/> Sold <input type="checkbox"/> Incorporated <input type="checkbox"/> Moved		Mailing address _____			
Date of change: _____		Phone no. _____			
		Email _____			

Preparer and Owner Information/Signature

I, the undersigned declare under penalties of law that I have personally examined this return and its completed schedules. To the best of my knowledge and belief, this return is true, correct and complete.

Preparer Matt Arroyos		Owner Aldi Inc. (Wisconsin)	
Name (please print) c/o Ryan LLC		Name (please print) c/o Ryan Tax Compliance Services, LLC	
Address Houston TX 77056		Address Houston TX 77056	
Phone (888) 868-4186	Fax (800) 642-7689	Phone (888) 868-4186	Fax (972) 960-0613
Email ptscompliance@ryan.com		Email PTSCCompliance@Ryan.com	
Signature <i>Matt Arroyos</i>		Signature _____	
Date 05/23/2019		Date 05/23/2019	

Schedule A – Personal Property Return (Assessment Summary as of January 1, 2019)

This schedule summarizes all taxable personal property from Schedules B through H. Line 10, Col. 3 is the total value of your taxable personal property within this municipality.

Col. 1 Property Type	Col. 2 Subtotal	Col. 3 Total	For Office Use Only	
			Class	Col. 4
1. Boats and watercraft (from Sch. B)			1	
2. Furniture, fixtures and equipment (from Sch. D)	101,996			
3. Multifunction fax machines, copiers, postage meters ... (from Sch. D2)				
4. Total of lines 2, 3		101,996	3	
5. Building on leased land (from Sch. E)			4B	
6. Leased equipment (property in charge of but not owned) (from Sch. F)				
7. Supplies (from Sch. G)	400			
8. All other personal property (from Sch. H)	7,063			
9. Total of lines 6, 7, 8		7,463	4A	
10. Total assessable – add lines 1, 4, 5, 9		109,459		

Schedule B – Boats and Watercraft					2019
Report: All boats and watercraft subject to general property taxation. Review the <i>Composite Conversion Factors</i> and <i>Composite Useful Lives Table</i> on various equipment: http://www.revenue.wi.gov/Pages/Report/p.aspx#personal .					
Col. 1 Description of Boats and Watercraft	Col. 2 Acquisition Year	Col. 3 Original Cost	Col. 4 Conversion Factor	Col. 5 Declared Value January 1	Col. 6 For Office Use Only
Total declared value					
<i>(Note: Attach additional sheets if needed)</i>				Enter Col. 5 Total on Sch. A, Line 1, Col. 3	

Schedule C – Machinery, Tools and Patterns						2019
Report: All machinery and shop equipment. Use the costs from your accounting records. Summarize the original asset costs by acquisition year as of January 1 of last year. Enter these costs in Col. 2. Enter any additions or deletions by acquisition year in Col. 3.						
Col. 1 Acquisition Year	Col. 2 Total Original Cost as of Jan. 1, 2018	Col. 3 Additions, Disposals, Transfers at Cost Since Jan. 1, 2018	Col. 4 Net Total Original Cost as of Jan. 1, 2019 (Col. 2 +/- Col. 3)	Col. 5 Conversion Factor (10-yr)	Col. 6 Indexed Net Value (Full Value) on Jan. 1, 2019 (Col. 4 x Col. 5)	Col. 7 For Office Use Only
2018						
2017						
2016						
2015						
2014						
2013						
2012						
2011						
2010						
2009						
All prior years						
Total						

Do Not Report

Schedule D – Furniture, Fixtures and Equipment						2019
Report: All furniture, fixtures and equipment (e.g., office, store and professional furniture, fixtures and equipment, business and professional libraries, other assets related to the sales and administration of your business). Original Cost in Col. 4, should contain all costs of installation and freight, add-ons and sales tax.						
Col. 1 Acquisition Year	Col. 2 Total Original Cost as of Jan. 1, 2018	Col. 3 Additions, Disposals, Transfers at Cost Since Jan. 1, 2018	Col. 4 Net Total Original Cost as of Jan. 1, 2019 (Col. 2 +/- Col. 3)	Col. 5 Conversion Factor (10-yr)	Col. 6 Indexed Net Value (Full Value) on Jan. 1, 2019 (Col. 4 x Col. 5)	Col. 7 For Office Use Only
2018		859	859	.925	795	
2017		10,054	10,054	.794	7,983	
2016	16,905		16,905	.675	11,411	
2015	1,216		1,216	.579	704	
2014				.497		
2013	60,269		60,269	.426	25,675	
2012	1,818		1,818	.366	665	
2011	13,387		13,387	.321	4,297	
2010	183,512		183,512	.275	50,466	
2009				.233		
All prior years				.140		
Total	277,107	10,913	288,020		101,996	
					Enter Col. 6 Total on Sch. A, Line 2, Col. 2	

**Schedule D1 – Exempt Computer Equipment & Software (Owned),
Cash Registers & Single Function Fax Machines**

2019

- **Report:** Mainframe computers, minicomputers, personal computers, networked personal computers, servers, terminals, monitors, disk drives, electronic peripheral equipment, tape drives, printers, basic operational programs, systems software, prewritten software, ATMs, cash registers, and single function fax machines. Review the *Computer Exemption Guidelines for Assessors and Property Owners* (revenue.wi.gov/DOR%20Publications/compexqd.pdf).
- **Do not report:** Custom software
- **Note:** Per state law (sec. 70.36(1m), Wis. Stats.), any person, firm or corporation that fails to include information on exempt property under sec. 70.11(39) and sec. (39m) will owe \$10 for every \$100 or major fraction that is not reported (sec. 70.35, Wis. Stats.).

Col. 1 Acquisition Year	Col. 2 Total Original Cost as of Jan. 1, 2018	Col. 3 Additions, Disposals, Transfers at Cost Since Jan. 1, 2018	Col. 4 Net Total Original Cost as of Jan. 1, 2019 (Col. 2 +/- Col. 3)	Col. 5 Conversion Factor (4-yr)	Col. 6 Indexed Net Value (Full Value) on Jan. 1, 2019 (Col. 4 x Col. 5)	Col. 7 For Office Use Only
2018						
2017						
2016						
2015						
2014						
2013						
2012						
All prior years						
Total						
Total leased equipment from Sch. F, Col. 7						
Combined totals						

Do Not Report

**Schedule D2 – Multifunction Faxes, Copiers, Postage Meters, Telephone Systems,
and Computerized Equipment**

2019

Report: All multifunction fax machines, copiers, postage meters, telephone systems (PBXs), and equipment with embedded computerized components.

Col. 1 Acquisition Year	Col. 2 Total Original Cost as of Jan. 1, 2018	Col. 3 Additions, Disposals, Transfers at Cost Since Jan. 1, 2018	Col. 4 Net Total Original Cost as of Jan. 1, 2019 (Col. 2 +/- Col. 3)	Col. 5 Conversion Factor (6-yr)	Col. 6 Indexed Net Value (Full Value) on Jan. 1, 2019 (Col. 4 x Col. 5)	Col. 7 For Office Use Only
2018				.875		
2017				.663		
2016				.497		
2015				.376		
2014				.285		
2013				.216		
All prior years				.122		
Total						
<i>Enter Col. 6 Total on Sch. A, Line 3, Col. 2</i>						

Schedule E – Buildings on Leased Land

2019

Report: Buildings, structures and other improvements you own, but are located on land that you do not own. They are valued in the same manner as improvements located on land that is owned by you. Enter your opinion of value in Col. 4.

Col. 1 Property Description	Col. 2 Acquisition Year	Col. 3 Original Cost	Col. 4 Opinion of Value January 1	Col. 5 For Office Use Only
Total declared value				
<i>Enter Col. 4 Total on Sch. A, Line 5, Col. 3</i>				

Schedule F – Leased Equipment (Property in charge of but not owned)

2019

Report: All leased equipment (e.g., business furniture, fixtures, equipment, machines, postage meters, tools, advertising devices) and similar items loaned, leased, stored or otherwise held and not owned by you. These items may or may not be assessed to you. Often, leases state whether the owner or the lessee is responsible for the personal property taxes. Review the *Composite Conversion Factors* and *Composite Useful Lives* on various equipment: <http://www.revenue.wi.gov/Pages/Report/p.aspx#personal>.

Col. 1 Name and Address of Leasing Company*	Col. 2 Equipment Type and Lease No.	Col. 3 Gross Annual Rent	Col. 4 Installation Year	Col. 5 Original Cost	Col. 6 Indexed Value Taxable Equipment	Col. 7 For Office Use Only

Totals

Enter Col. 6 Total on
Sch. A, Line 6, Col. 2

Schedule G – Supplies

2019

Report: Your supplies inventory. Report items that are in your possession on January 1 and are expensed and not subject to resale, but are necessary in the conduct of business and are consumed in the operations of providing customer services. **Supplies include:** Items used for selling and advertising, office, shipping, medical, dental, janitorial and cleaning

Supplies inventory – January 1, 2019 \$ **400**

Enter amount on Sch. A, Line 7, Col. 2

Schedule H – All Other Personal Property, Leasehold Improvements, Signs, Billboards, Logs and Forest Products, Improvements on Exempt Land, Improvements on Forest Cropland or Managed Forestland

2019

Report: All leasehold improvements and other personal property not previously reported on other schedules. Report improvements on exempt land and privately owned structures, billboards, cable television towers or special taxed land. Review the *Composite Conversion Factors* and *Composite Useful Lives Table* on various equipment: <http://www.revenue.wi.gov/Pages/Report/p.aspx#personal>.

Leasehold Improvements – any alterations, additions or improvements, adding value, made by a tenant to leased or rented premises. Enter the total improvement cost in Col. 3.

Include: Logs and other forest products belonging to persons whose principal activity is not related to the buying, selling or manufacturing that type of property.

Exclude: Merchant's or manufacturing stock.

Col. 1 Acquisition Year	Col. 2 Property Description	Col. 3 Acquisition Cost	Col. 4 Conversion Factor	Col. 5 Declared Value January 1	Col. 6 For Office Use Only
Total				7,063	

See Attached

Lease or Asset Information

Enter Col. 5 Total
on Sch. A, Line 8, Col. 2

For each property you are leasing, provide the following: (attach additional sheets if necessary)

Property

Term	Start _____ End _____ <small>(mm-yyyy) (mm-yyyy)</small>	Square footage – leased area _____ Sq. Ft.	Annual base rent \$ _____ 0
Sales/rent			
If your sales are the basis for your rent, enter percentage of sales you pay as rent. _____ % Amount paid \$ _____			
Rent includes: (check all that apply) <input type="checkbox"/> Electric <input type="checkbox"/> Heat <input type="checkbox"/> Real estate taxes <input type="checkbox"/> Parking <input type="checkbox"/> Common area maintenance			
<input type="checkbox"/> Other (describe)			

Manitowoc City, WI
2019 Business Personal Property Tax Return - 000-309-666

Taxpayer: Aldi Inc. (Wisconsin)
 FEIN: 36-3498392
 Location ID: 64034
 Account #: 000-309-666

Aldi-Loc# 64034
 4111 Harbor Town Lane
 Manitowoc, WI 54220-5855

Taxable - Detail

Form: Schedule D - Furniture, Fixtures and Office Equip **Depreciation: 10 YR Sched D**

Date Acq	Age	Asset ID	Asset Description	Cost	Dep Value	Assd Value
09-30-2018	1	500160323-0	18-Q3 USE TAX	859	795	816
07-14-2017	2	500139248-0	SECURITY/ALARM SYSTEM-EAS	4,565	3,624	3,723
11-25-2017	2	500168415-0	SPOT MERCHANDISER	5,489	4,358	4,477
05-23-2016	3	500046364-0	SAFEPOINT	7,696	5,195	5,336
09-16-2016	3	500046535-0	STRADDLE STACKER	7,329	4,947	5,082
09-15-2016	3	500046742-0	SHELVING	1,880	1,269	1,304
05-26-2015	4	500046077-0	SAFE/TILL LOCKERS	1,216	704	723
07-07-2013	6	500045654-0	SHELVING	19,540	8,324	8,550
07-07-2013	6	500045730-0	MULTI DECK REACH IN	40,730	17,351	17,823
12-01-2012	7	500045204-0	DISPLAY TABLES	1,818	665	683
05-25-2011	8	500111521-0	SHOPPING CARTS	13,387	4,297	4,414
06-17-2010	9	500044286-0	MULTI DECK REACH IN	38,120	10,483	10,768
06-17-2010	9	500044288-0	SAFE AND SAFE BASE	5,414	1,489	1,529
06-17-2010	9	500044306-0	SHELVING	35,305	9,709	9,973
06-17-2010	9	500044309-0	ELECTRIC POWER SAVING EQUIPMENT	35,558	9,778	10,044
06-17-2010	9	500044327-0	SECURITY CAMERA SYSTEM	11,478	3,156	3,242
06-17-2010	9	500044337-0	COOLER FREEZER SHELVING	21,930	6,031	6,195
06-17-2010	9	500044339-0	SPOT MERCHANDISER	3,374	928	953
06-17-2010	9	500044340-0	SPOT MERCHANDISER	3,374	928	953
06-17-2010	9	500044341-0	SPOT MERCHANDISER	3,374	928	953
06-17-2010	9	500044342-0	SPOT MERCHANDISER	3,374	928	953
06-17-2010	9	500044343-0	SPOT MERCHANDISER	3,374	928	953
06-17-2010	9	500044344-0	SPOT MERCHANDISER	3,374	928	953
06-30-2010	9	500044346-0	ALARM SYSTEM	14,423	3,966	4,074
10-31-2010	9	500044389-0	TIME CLOCKS	1,039	286	294
Form Subtotal:				288,020	101,996	104,770

Totals for Form: Furniture, Fixtures and Office Equip (Total of all assets subtotaled above in this form category)

2018	859	795	816
2017	10,054	7,983	8,200
2016	16,905	11,411	11,721
2015	1,216	704	723
2013	60,269	25,675	26,373
2012	1,818	665	683
2011	13,387	4,297	4,414
2010	183,512	50,466	51,838
Total	288,020	101,996	104,770

Form: Schedule G - Supplies **Depreciation: Not Depreciated**

Date Acq	Age	Asset ID	Asset Description	Cost	Dep Value	Assd Value
12-31-2018	1	07566756297-000361	Supplies	400	400	411
Form Subtotal:				400	400	411

Totals for Form: Supplies (Total of all assets subtotaled above in this form category)

2018	400	400	411
Total	400	400	411

* Percent Good is a composite of the percent good allowed and the trend factor if one is applicable
 * Values may differ slightly from the return due to rounding issues

Manitowoc City, WI
2019 Business Personal Property Tax Return - 000-309-666

Taxpayer: Aldi Inc. (Wisconsin)
FEIN: 36-3498392
Location ID: 64034
Account #: 000-309-666

Aldi-Loc# 64034
4111 Harbor Town Lane
Manitowoc, WI 54220-5855

Form: Schedule H - Other PP	Depreciation: 10 YR Sched H
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Date Acq	Age	Asset ID	Asset Description	Cost	Dep Value	Assd Value
06-17-2010	9	500044282-0	SIGN-MONUMENT	2,945	810	832
05-31-2010	9	500044323-0	SIGN-PYLON	17,762	4,885	5,017
06-17-2010	9	500044338-0	SIGN-BUILDING	4,976	1,369	1,406
Form Subtotal:			3 Assets	25,684	7,063	7,255

Totals for Form: Other PP	(Total of all assets subtotaled above in this form category)
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2010	25,684	7,063	7,255
Total	25,684	7,063	7,255

Totals for Taxable	
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	Original Cost	Dep Value	Assd Value
	314,104	109,459	112,436

* Percent Good is a composite of the percent good allowed and the trend factor if one is applicable

* Values may differ slightly from the return due to rounding issues

Add/Delete Amounts Included in Previous Section (Listed For Information Purposes Only)

Manitowoc City, WI
2019 Business Personal Property Tax Return - 000-309-666

Taxpayer: Aldi Inc. (Wisconsin)
FEIN: 36-3498392
Location ID: 64034
Account #: 000-309-666

Aldi-Loc# 64034
4111 Harbor Town Lane
Manitowoc, WI 54220-5855

Taxable-Add - Detail

Form: Schedule D - Furniture, Fixtures and Office Equip **Depreciation: 10 YR Sched D**

Date Acq	Age	Asset ID	Asset Description	Cost	Dep Value	Assd Value
09-30-2018	1	500160323-0	18-Q3 USE TAX	859	795	816
07-14-2017	2	500139248-0	SECURITY/ALARM SYSTEM-EAS	4,565	3,624	3,723
11-25-2017	2	500168415-0	SPOT MERCHANDISER	5,489	4,358	4,477
Form Subtotal:			3 Assets	10,913	8,777	9,016

Totals for Taxable-Add

Cost	10,913	Dep Value	8,777	Assessed Value	9,016
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Assets

* Percent Good is a composite of the percent good allowed and the trend factor if one is applicable

* Values may differ slightly from the return due to rounding issues