

From: Soura, Christian
To: Baker, Josh <JoshBaker@gov.sc.gov>
Date: 9/13/2011 11:05:37 AM
Subject: DoR Request

Josh,

I took a look at the draft data request from DoR, and had some thoughts about how to restructure it so as to (1) break it into more manageable pieces and (2) get a faster turnaround for the items that are more immediate priorities. I reached out to BEA this morning (Frank Rainwater) to try and get some information from them instead of Revenue, in areas where BEA has historically been the source of record (like sales tax exemptions).

So getting back to what we should request from DoR right away...their 2008-09 Annual Report is now available online, so we can work off of that. We'd like to see expansions of the following tables, to these specifications:

- Pages 40-41 [Indiv Income Tax Returns by Income Class]: Preserve the format of this report, but provide this information with greater granularity. Use brackets of \$1,000 increments up to \$100,000, then \$5,000 increments to \$200,000, then \$10,000 increments to \$350,000, then \$25,000 increments to \$500,000, and then \$50,000 increments to \$1 million. Those above \$1 million could be aggregated in a single category.
- Page 45 [Indiv Income Tax Credits]: Can this table be disaggregated, and broken down by the taxable income ranges that are requested for the chart on pages 40-41?
- Page 53 [Corporate Income Tax Credits]: Can the credits and credit amounts reported here be broken down by some type of income bracket? We're trying to get a handle on how these credits are distributed over small vs. large businesses.

Finally, could you ask them to project the revenue loss if we dropped the manufacturer's property tax from 10.5% to 6% or to 4%? We should also ask them to score an elimination of the corporate income tax. We should work with them on deciding what the right effective dates would be to score these for. For instance, can they score these on FY and CY bases, with an estimated effective date of 1/1/13? Open to suggestion from you/them if an alternate approach is merited.

Let's start here, see how fast they can turn this around, and decide where to go from there. Also, we should be clear that we'd like to receive these responses as they are completed, instead of waiting for all of it to be done. Call/email if you wanna discuss...it would be best if you remained as our primary contact with Meredith. We need to develop some good, productive, stable working relationships with the folks who own the data and will help us score some of the models, going forward. Thanks.

CLS

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