



Revolutionizing Property Tax Appeals

Bridge Round

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Date: 08/01/2025

[Assessorly.com](https://www.assessorly.com)





Problem

- \$14B+ in overpaid property taxes annually in the U.S.
- Homeowners often don't know they can appeal or how to.
- The appeals process is opaque, tedious, and underutilized.
- Local assessors operate with limited data and oversight.
- Homeowners are often left overassessed and overcharged.

We empower those who are unaware, unable, or overwhelmed by the appeals process—giving them both a voice and a path to action.



Solution: Assessorly

Assessorly is a seamless, data-driven platform that helps homeowners reduce their property tax burden, risk-free.

We follow a proven process for property tax appeals, eliminating guesswork and uncertainty.

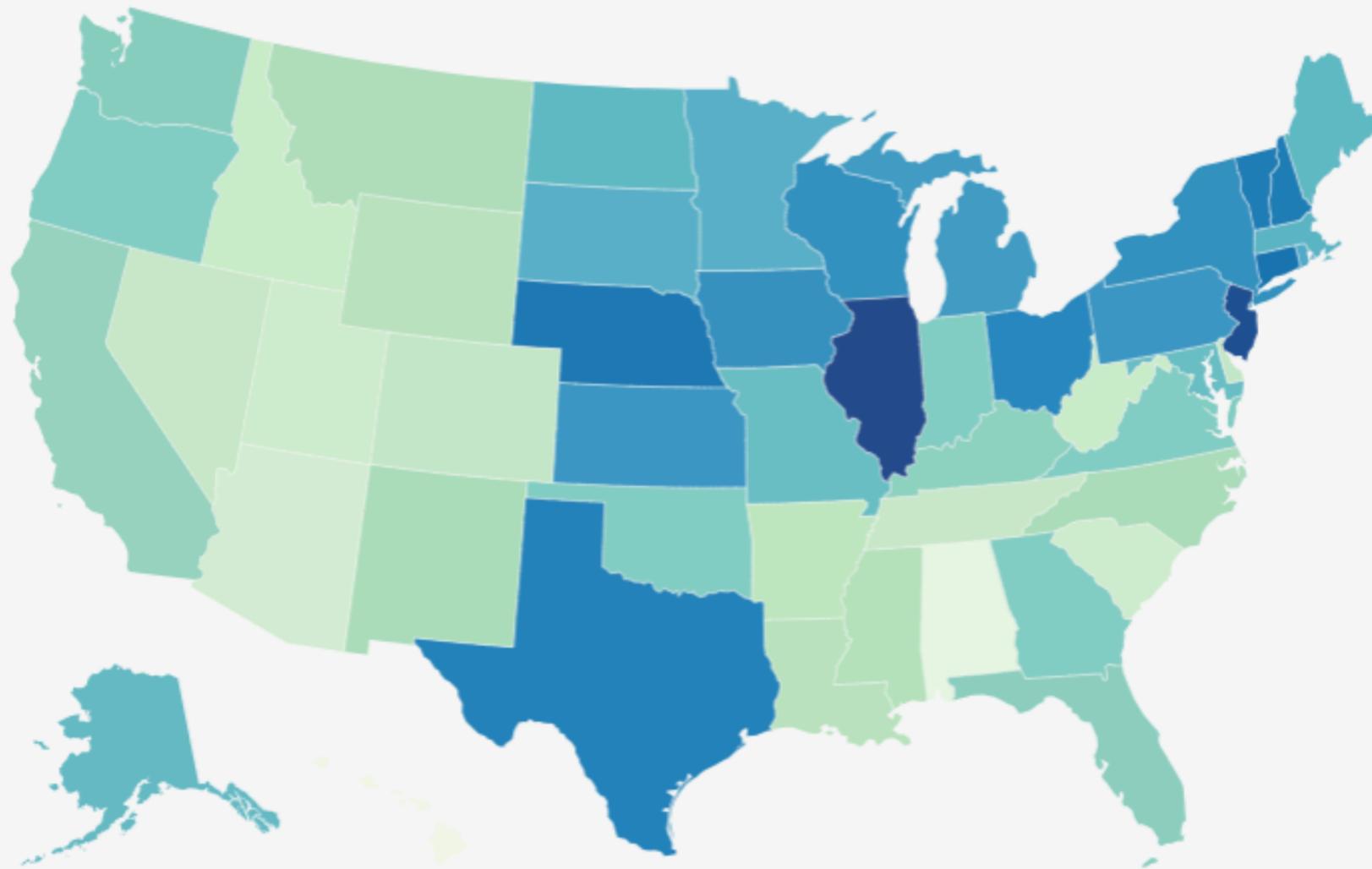
- Algorithm-driven valuation models analyze property assessments for fairness. Ready for AI implementation.
- Simple, 30 second online intake form.
- We handle the appeal process end-to-end.
- No savings, no fee. Guaranteed.



Roadmap to Success

How High Are Property Taxes in Your State?

Property Taxes Paid as a Percentage of Owner-Occupied Housing Value, 2023



- **U.S. Property Tax Market:** \$797B projected for 2024
- **Residential Property:** \$352B (44% of total property tax revenue) from residential properties
- 86M residential properties
- **Total Addressable Market (TAM):** \$5B+ in annual fee opportunity
- **Expanding into Commercial Property:** Exploring new opportunities
- **Strategic Partnerships:** Collaborations with real estate agents and accountants

Phased Expansion

Homeowners across the U.S. are overpaying more than \$14 billion per year in property taxes often unknowingly.

Assessorly is uniquely positioned to correct this, starting state by state, using data, automation, and consumer-first design.

Tier 1: CO, TX, WA, OR

- Appeal / Abatement process is straight forward
- Mass appraisal systems with frequent overvaluation
- Competition is limited in TX, none in WA, OR, CO
- 26.7M housing units



Phased Expansion

Tier 2: WI, IA, GA, OH, FL

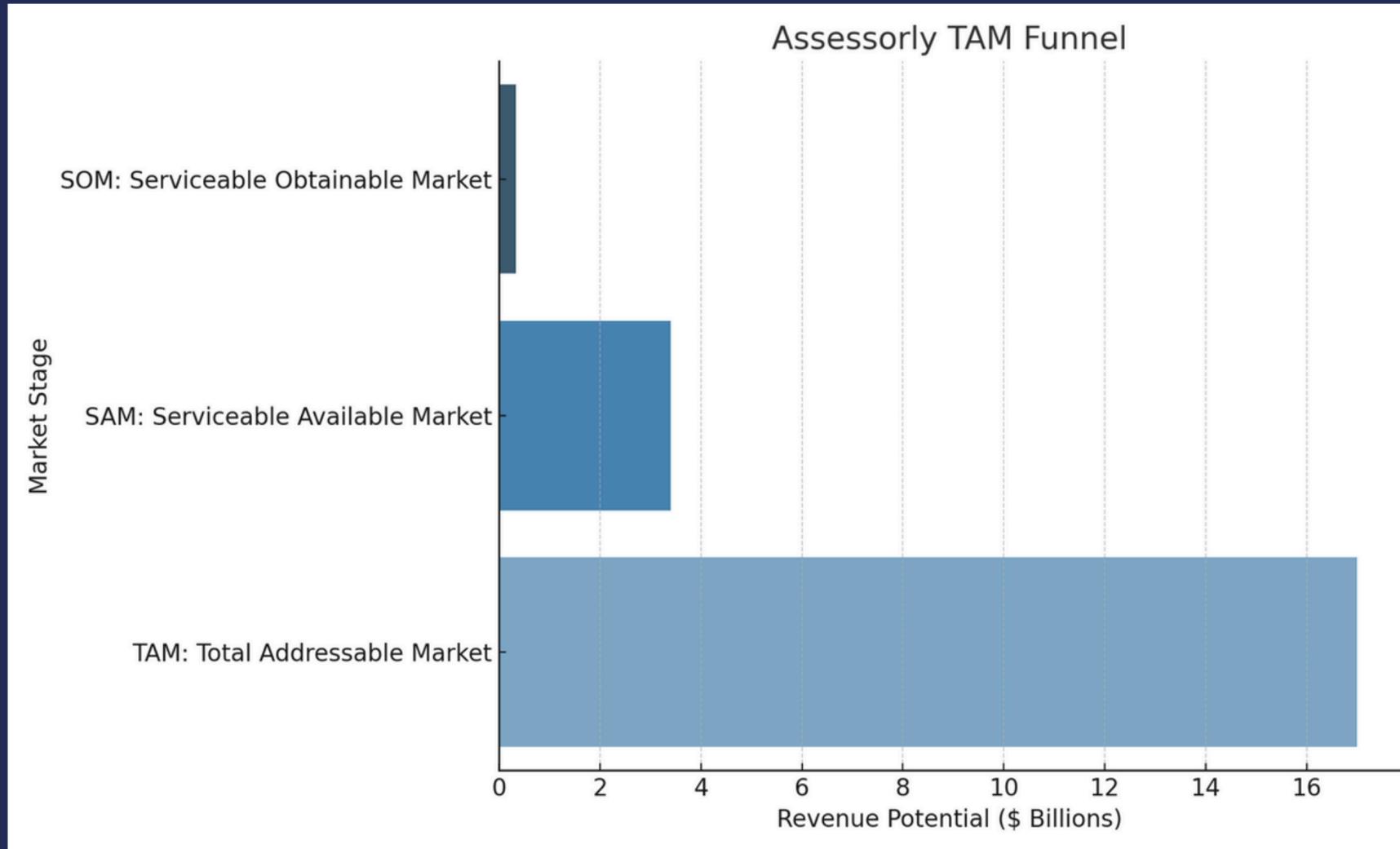
- WI and OH could be Tier1 markets.
- IA has 5-10 year abatements.
- FL has a unique process, some competition but no digital platform

Tier 3: CA, NY, IL, NJ

- Well known for having very difficult assessor's to deal with.
- IL requirements include legal representation
- While underserved, has a reasonable amount of support from legal, account, appraiser and like firms to Assessorly



Tax Appeal Market Breakdown



TAM Calculation

- 20% of 68M homes = 13.6M appealable homes
- 13.6M x \$250 fee = \$3.4B annual TAM
- With multi-year appeals, commercial property, portfolio, and upsell services, TAM scales to \$5B+

- **Residential Properties:** 68 million in the U.S.
- **Appeal-Eligible Properties:** 15-20% of homes are overassessed annually and could benefit from an appeal.
- **Average Consumer Savings:** Appeals typically reduce taxes by \$900–1,200 per year.
- **Assessorly Fee:** A flat \$275 or \$0 contingency, 30%



It's as Easy as This!

Type in your address and get a free assessment on your property and let Assessorly handle the rest!

The screenshot shows the Assessorly website interface. At the top, there is a location indicator for Denver, Colorado, USA, and social media icons. The main header includes the Assessorly logo, the text 'Douglas County Beta Launch', and a '2023 Back Tax Deadline December 31st' with a countdown timer showing 186d 17h 38m 16s. A navigation menu contains links for HOME, ABOUT, FAQ, TEAM, LIBRARY, TRACKING, INVESTORS, NEWS, and CONTACT. The main content area features a dark blue background with the text 'FAIR TAXES, REAL SAVINGS!' and 'FREE TAX ASSESSMENT'. Below this, it says 'Enter your address for a free assessment'. A search bar with the placeholder text 'Enter your property address' and a 'Map' button is present. A mouse cursor is hovering over the search bar. Below the search bar, there is a dark blue bar with the text 'GATHERING DATA FROM PUBLIC RECORDS AND RUNNING THE ASSESSORLY AVM'. The footer contains three columns: 'ABOUT US', 'DEADLINES' (with text: 'Our proprietary AVM works for you 24 hours a day 7 days a week. Our services in only in beta for Colorado.'), and 'QUICK LINKS' (with links for 'Investors' and 'Home'). The Assessorly logo is also visible in the footer.



In seconds, you know

- **Assessorly** instantly retrieves your property data and processes it through our proprietary valuation algorithms.
- A visual confirmation, including a photo and map, is displayed for easy reference.
- We provide a clear, data-backed assessment of your current property tax burden.



Last recorded sale: \$227100.00 on 6/7/1998

Lot Size: 0.154 acres

Living Area: 2,502 sq ft

Finished Basement: 0 sq ft

Unfinished Basement: 760 sq ft

Front Taxes (2025–2026 Tax Cycle)

Tax Impact Summary

Douglas County Value: \$788,687.00

Assessorly Estimated Value: \$760,925.15

Douglas County Property Tax: \$4,980.17

Assessorly Estimated Property Tax: \$4,804.87

Potential Savings: \$350.60

2023: \$175.30

2024: \$175.30

Back Taxes (2023–2024 Tax Cycle)

Tax Impact Summary

Douglas County Value: \$829,012.00

Assessorly Estimated Value: \$642,938.90

Douglas County Property Tax: \$5,225.20

Assessorly Estimated Property Tax: \$4,052.40

Potential Savings: \$2,345.61

2020: \$1,172.81

2022: \$1,172.81



Analysts Portal

Our Consultant dashboard offers quick access to data and filters, enabling property valuation in under 10 minutes due to its smart design.

The dashboard is divided into several sections:

- Filters:** Includes sliders for Age 2001 (1991-2011), Site Size 0.987 (0.740-1.233 archers), and GLA Above 2976.00 (2232-3720 sqf). It also has a 'Property Type' section with radio buttons for Single Family Residential (selected), Single Family Residential on Ag, Condominium unit, and Townhouse. An 'Adjustable Rate (\$/sqft)' field is set to \$190. A 'Table Information' dropdown is set to 'PropertyUnit'. A 'Reset Filters' button is at the bottom.
- SQL Query:** A text area containing a complex SQL query for selecting distinct property units.
- Comparable #1:** 950 COTTONWOOD LN, Douglas County, Colorado 80118. Value: \$870,000.00 - September 22, 2021. 2248.00 GLA • Single Family Residential • 3 BR • 1 BA • 1999 Yr • 0.8421 Acres. Includes a table with columns: address_number, street_name, active_status, location.
- Comparable #2:** 767 TENDERFOOT DR, Douglas County, Colorado 80118. Value: \$640,000.00 - July 21, 2020. 2464.00 GLA • Single Family Residential • 3 BR • 1 BA • 1994 Yr • 0.9103 Acres. Includes a table with columns: address_number, street_name, active_status, location.
- Comparable #3:** 7350 FREMONT PL, Douglas County, Colorado 80118. Value: \$785,000.00 - May 13, 2021. 2929.00 GLA • Single Family Residential • 3 BR • 1 BA • 1998 Yr • 0.8836 Acres. Includes a table with columns: address_number, street_name, active_status, location.
- Map:** A 3D-style map showing the subject property and its comparables. The subject property is highlighted with a blue pin and a blue outline. The map includes a toolbar with zoom, pan, and other navigation tools.



Product Line up

- AssessorlyAVM (Free): Instant automated valuation
- SnapShot Report (\$75): Tech driven 10 comps + analytics + visual maps
- FairValue Report (\$125): Pro-written appeal-ready report
- Full Service - Flat Fee (\$275): Includes representation and guarantee
- Full Service - Contingency (30%): No win, no pay

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Property Tax Appeal Report

Assessorly Co.

Prepared for
Subject Address: 1000 COCHETOPA DR, Douglas County, Colorado 80118

This valuation report has been prepared exclusively for the purpose of a real estate property tax appeal. It is not intended for any other use. The intended user of this report is the client: Last, First.

General Information

General Information			
Legal Description:	LOT 39 SAGE PORT #6B 0.980 AM/L		
Type:	Single Family Residential (100)	Garage size:	738
Site Size:	0.00	Year of Construction:	2001
GLA (above grade):	2976.00	Condition:	Good
Basement (gross / finished):	1678.00 / 0	Bedrooms:	4
Bath Count:	1	Assessor's Actual Value (Year):	\$6,176.13 (2023)

Tax Impact Summary

Douglas County Value: \$936,295.00

Assessorly Estimated Value: \$797,502.82

	Vendor, LLC	Vendor, LLC	Vendor, LLC	Vendor, LLC
Sale Price	-	\$500,000	\$525,000	\$511,000
Date of Sale	-	2/1/2025	12/1/2024	1/1/2025
Location	Urban/Viles	Urban	Urban	Urban
Site Size	0.14	0.07 +25,000	0.14	0.14
View	Residential	Residential	Residential	Residential
Age/Year Built	50	49	54	62
Quality	Q3	Q3	Q3	Q3
Condition	C4	C4	C3 -20,000	C5 +10,000
GLA	1900	1800 +10,000	2000 -4,000	1900
GLA - below grade	500	500	0 +5,000	1500 -10,000
Garage	2 Car	2 Car	None -20,000	2 Car
Other	-	-	-	-
Adjusted Sale Price	-	\$529,000	\$526,000	\$531,000

Regression Results: Adjustments, Rates and R² (Insert Values)

Analyst Comments: (Up to 500 characters of notes here.)

Map

Pictures



Market Segments X Products, Pricing, Margin, and CAC

Market Segment	Products	Margin	Pricing	CAC
Consumer Level	DIY property tax appeal tools and full representation service	70% – 80%	\$75 – \$275 per cycle	\$25 – \$75
Institutional Investors / Portfolio	Snapshot (AVM report) and SnapshotPro (AVM with analyst review)	80% – 90%	Snapshot: \$75/unit, SnapshotPro: \$100/unit	\$15 – \$50
Subscription / Monitoring	Ongoing property value monitoring and alerts	0%	Free (introductory)	\$5 – \$15

Monitoring is a loss leader to increase signups and subscriptions. This is only a technology lift.



AI Use and Adoption

Valuation Engine

We are actively researching to enhance our AVM with machine learning to handle non-linear variables such as location nuances and property quality. This results in more accurate valuations and smarter comp selection, foundational to fair tax appeals at scale.

Marketing Intelligence

Every valuation run feeds a growing dataset, enabling geo-targeted marketing campaigns. AI will be used to identify neighborhoods with the highest potential for over-taxation recovery, significantly improving CAC-to-LTV ratios and campaign efficiency.

Conversational AI (Chatbot)

AI-powered assistant guides users through the appeal process, answers real-time questions, and reduces drop-off. The goal is to improve conversion rates, simplifies education, and provides 24/7 support, turning complexity into clarity.



Marketing Material

Currently, we do not gate the AVM with an email. This will change once we have public trust and buy in. This is a significant loss of marketing ability.

Upon reviewing the AVM results, a pop up will appear requesting for an email to send the custom report to their email. This will allow us to capture their email and to have our material sitting with them.

Our current 1-sheet will have a future purpose for sharing onto social media or email.

FYI: This house sold 09/2021 for \$890K. Given positive market conditions, \$970K is reasonable, yet the County has this at \$1,130K

Property Tax Over-Assessment Finding

866 SHADOWSTONE DR, Highlands Ranch, CO, 80129



ASSESSORLY.COM offers simple, transparent pricing for property tax appeal services:

- AssessorlyAVM**
FREE — Instant market insights powered by our automated valuation model.
- SnapShot Report**
\$75 per tax cycle — A report generated by our AssessorlyAVM. The report provides comparable sales, statistical inference of data, mapping of data and pictures of comparable data.
- FairValue Report**
\$125 per tax cycle — A professionally analyzed and written report, ready to be delivered to the Assessor
- Full Service - Flat Fee**
\$275 per tax cycle — You pay one fee and get a FairValue Report and representation at the Board of Equalization. If we don't win you will get your money back.
- Full Service - Contingency**
\$0 upfront — Contingency: You pay \$0 to get started. We review, analyze and appeal your property taxes. If we win, you pay 30% of the recovered funds.

All services include real-time report tracking. **Full Service** packages provide expert review, appeal optimization, and professional representation before Douglas County's Board of Equalization.

Front Taxes (2025–2026 Tax Cycle)

Douglas County Value: \$1,000,719.00

Assessorly Estimated Value:
\$1,092,291.81

Douglas County Property Tax: \$6,319.46

Assessorly Estimated Property Tax:
\$6,897.74

Potential Savings: \$0

(No overassessment detected)

Join our [Assessorly.com/newsletter](https://www.assessorly.com/newsletter) for updates!

Back Taxes (2023–2024 Tax Cycle)

Douglas County Value: \$1,130,080.00

Assessorly Estimated Value:
\$973,767.55

Douglas County Property Tax: \$7,122.80

Assessorly Estimated Property Tax:
\$6,137.57

Potential Savings: \$1,970.45

2023: \$985.22

2024: \$985.22

ESTIMATED SAVINGS: \$1,970.45

The Assessorly Automated Valuation Model (AVM) provides an estimated property value based on publicly available data, comparable sales, and proprietary valuation algorithms. This estimate is for informational purposes only and is not an appraisal or a substitute for the judgment of a licensed appraiser. Accuracy may vary based on data availability, property characteristics, and market conditions. Valuations may change over time due to updates in market data, improvements to the algorithm, and changes in AVM version. Users should verify all information independently before making financial, legal, or real estate decisions. Assessorly makes no warranties, expressed or implied, regarding the completeness or accuracy of the provided valuation.



Staff

CEO: Martin Froehlich

Martin Froehlich brings over 25 years of valuation experience across real estate, finance, and engineering. With a deep background in math, system design, and property analytics, he has designed, optimized, and scaled operations using Six Sigma Lean principles to achieve efficiency and precision. Martin has successfully built and run organizations of similar size and complexity, giving him hands-on expertise in taking a concept from early traction to sustainable growth. He has led countless valuation strategies at both individual and institutional levels, blending technical rigor with operational excellence. As a growth-minded executive with five years of leadership experience, Martin founded Assessorly to solve a problem he saw every day: homeowners being overtaxed with no clear path to challenge it. His unique cross-functional expertise—spanning data, process design, and valuation—positions him perfectly to lead a platform that simplifies, automates, and wins. For Martin, this isn't just a business. It's a mission, and he's not stopping.

CTO: Richard Miles

Our wunderkind, full-stack developer is the engineering force behind our innovative platform, seamlessly bridging front-end and back-end complexities. With a distinguished background that includes Chess.com and McKesson, where he navigated the intricacies of large-scale enterprise solutions, he brings a unique blend of agility and robust architectural expertise. His comprehensive understanding of the entire development lifecycle, coupled with a relentless drive for technical excellence, makes him instrumental in delivering our cutting-edge PropTech solutions.

Marketing: Alexis Wessner

Director of Sales: Austin Dilts

25-year veteran in real estate sales leadership, consistently delivering exceptional results by empowering sales teams through expert coaching and the strategic adoption of sales technology. Proven ability to scale operations and enhance sales productivity, making a direct impact on bottom-line growth.

Trained Consultants:

4 highly skilled consultants with a combined capacity of 2,000 reports per month.



Current Status

Traction :

- Early Sales with Friends and Family to prove function and feedback
- 40+ sign ups to Free Workshop 8/7
- 1000% increase in FB views
- Early partnerships forming with realtors and CPAs

Marketing in place

- Sales began August 1, 2025
- LinkedIn, IG, Facebook
- Free Workshops in place
- RE Agent Partnerships

Tech Remaining :

- Algorithm: Beta phase, adding AI to improve
- Portal: 95%; operational by 08/22
- Report: 95%; operational by 08/22
- Website: 100%

Beyond Douglas County

- Denver, Arapahoe and Boulder by 08/30
- Plan in place for Front Range coverage and to all Tier 1 States: TX, OR, WA
- Plan in place for National Roll Out
- Plan in place for AI adoption in algorithm, marketing, and product development.



Financials - Projected

2025 Aug-Dec

- Revenue: \$1.5M
- Gross Margin: 65%
- 1,000 appeals/month @ \$250

2026 Forecast

- Revenue: \$7.5M
- 5,000 appeals/month @ \$250
- Revenue CAGR: 400%
- Market Expansion: 5 more states

2027 Forecast

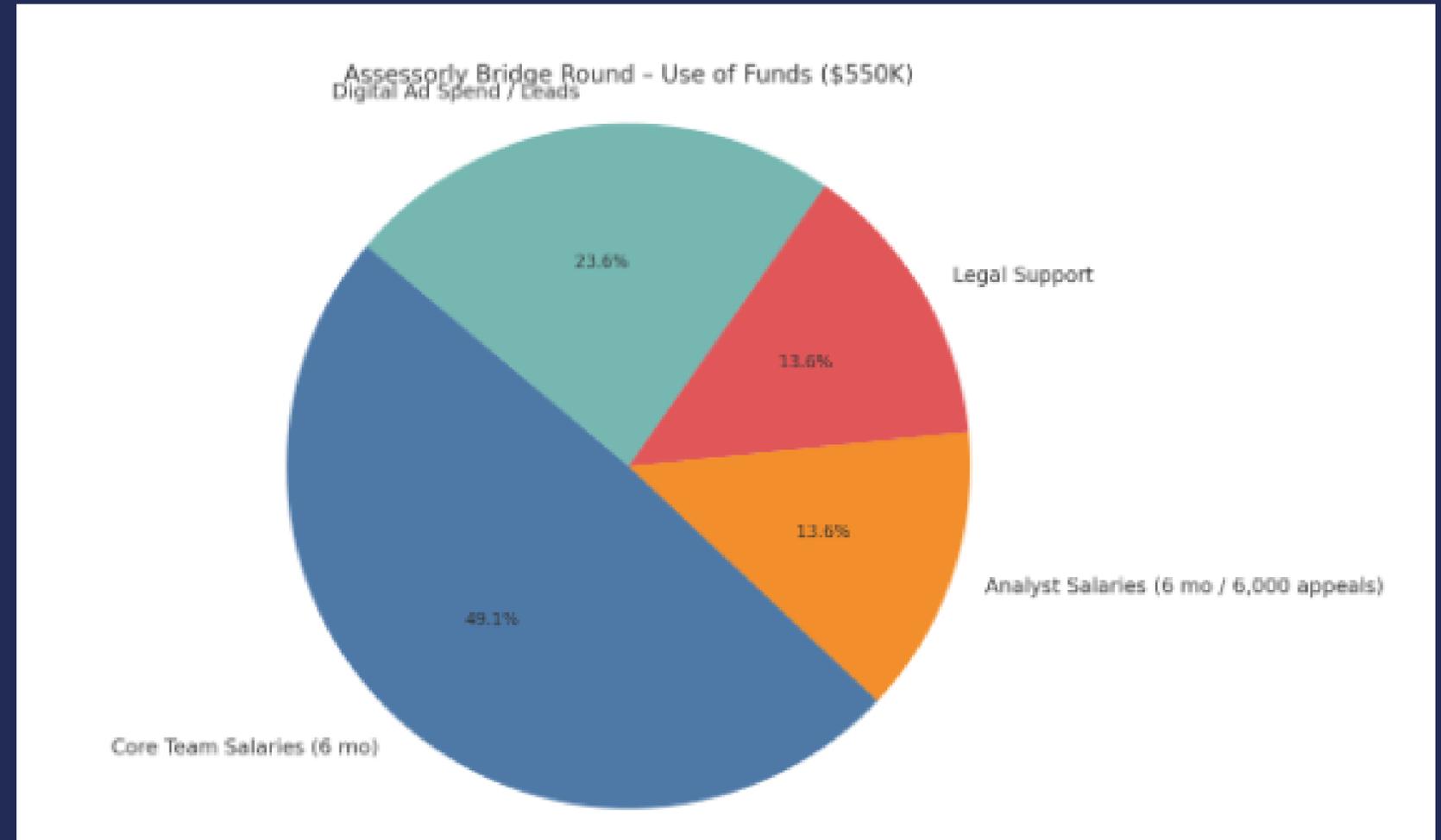
- Revenue: \$75M
- 25,000 appeals/month @ \$250
- Revenue CAGR: 900%
- Market Expansion: 6 more states



What's needed

The Ask

- \$550K Bridge Round
- 6 month runway
- Complete CO and begin WA, OR, TX
- Hire for additional sales and developer
- Accelerate customer acquisition and strategic partnerships



- 49.1% – Core Team Salaries (6 months)
- 13.6% – Analyst Salaries (6,000 appeals over 6 months)
- 13.6% – Legal Support and Review for continued expansion
- 23.6% – Digital Ad Spend / Lead Generation



Competitive Landscape

Company / Provider	State(s) Active	Tech-Driven	Manual / Individual	Hybrid	Pricing Transparency	Geographic Focus
Assessorly	CO, TX, WA, OR (Tier 1)	✔ Yes	⊖ No	⊕ Yes	✔ Flat + Contingency	Multi-state (growing)
Ownwell	TX, CO, CA, FL, WA	✔ Yes	⊖ No	⊕ Yes	✔ Contingency (25-50%)	Select national markets
KE Andrews	TX	⊖ No	✔ Yes	⊖ No	✘ Varies by case	Commercial focus (TX)
NTPTS (North Texas Property Tax Services)	TX	⊖ No	✔ Yes	⊖ No	✘ No public pricing	Local to DFW area
Paramount Property Tax	CA, TX	⊕ Partial	✔ Yes	⊕ Yes	✘ Case-by-case fees	Regional (CA, TX)
RetaxRefund	WA, OR	✔ Yes	⊖ No	⊖ No	✔ Free analysis, 50% fee	WA/OR (small firm)
TaxEase (loan-based)	TX	⊕ Partial	✔ Yes	⊕ Yes	✘ Loan model	TX only
Local County Tax Appeal Firms	All	✘ No	✔ Yes	⊖ No	✘ Unclear	Local-only

- Most competitors are either regionally locked, manual/consultant-based, or focused only on commercial clients.
- States like Colorado, Oregon and Washington have very little competition and are ideal for early Assessorly penetration.
- Texas has moderate competition, but few with true consumer-grade UX or automation.

Our Vision

Assessorly is more than just saving homeowners money, we're fostering trust, transparency, and empowering consumer rights in real estate taxation.

We're poised to lead the emerging Property Tax Tech category. Consider institutional investors: Goldman Sachs, BlackRock, Invitation Homes, etc with SFR portfolios; this product can offer millions in savings to each portfolio

Join us in scaling a platform that champions 68 million American homeowners one appeal at a time.

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