Town of Whitestown, Indiana
Personal Property Tax Abatement Application
Project Questionnaire

1. Name of the company for which personal property tax abatement is being requested: AmerisourceBergen Drug Company

2. State the name, title, address, telephone number and e-mail address of a company representative who may be contacted concerning this application:

Name and Title: David Heilman, Property & Sales Tax Manager

Address: 227 Washington Street, Conshohocken, PA 19428

Telephone: 610.727.7475

E-Mail Address: dheilman@amerisourcebergen.com

3. State the name, title, address, telephone number and e-mail address of a company representative responsible for filing the required annual compliance forms (Form CF-1) which will be used by the Town to determine if your company is compliant with the terms of the abatement application, including Form SB-1, and whether the abatement will continue or be terminated (the contact should be made aware of the compliance form's importance).

Name and Title: David Heilman, Property & Sales Tax Manager

Address: 227 Washington Street, Conshohocken, PA 19428

Telephone: 610.727.7475

E-Mail Address: dheilman@amerisourcebergen.com

4. Location of property for which personal property tax abatement is being sought:

a) Street Address: 5290 Performance Way, Whitestown, Indiana

b) Tax Parcel Number(s): There are 2 parcels for the property. Each of their parcel IDs have been included.

Parcel ID – 020-02280-03
State Parcel ID – 06-07-35-00-002.005-020

Parcel ID – 018-02280-03
State Parcel ID – 06-07-26-000-001.003-019

Attach a legal description and area map of the proposed project location.

5. What is the amount of the most recent assessment attributable to (this information is available on the most recent property tax form) the equipment at the project location:

Not applicable. Building is currently under construction.

6. Has this project or tax abatement request been discussed with the President of the Whitestown Redevelopment Commission and/or President of the Whitestown Town Council? __X__ Yes _____ No

7. Does your company currently conduct manufacturing operations, research and development, distribution and/or information technology research at this location? If so, how long has your company been at this location?

No, this will be a new location for the Company.

8. Does your business have other operations in Indiana? If so, please list the location of the other operations. MWI, a wholly owned subsidiary of AmerisourceBergen acquired in 2015, has a distribution center located at 3990 Perry Boulevard, Whitestown, IN. However, this location is not relevant to the operations at this new location.

9. What is the size of the facility in which the equipment will be installed?

300,000 square feet.

10. On a separate page, briefly describe the (i) product(s) manufactured, (ii) research and development conducted, (iii) the product distribution and/or (iv) the information technology conducted, by your company.

11. On a separate page, briefly describe the equipment to be installed by your company at the project location.

12. Has the new equipment been installed (Please note that State statute requires applicants to delay installation until after abatement has been granted)?

_____ Yes __X__ No

13. What is the anticipated date for installation to begin? Q3/Q4 2016

14. What is the anticipated date for project completion? Full operational capacity is expected Q4 2017.

15. Does the equipment being installed serve the same function as the equipment currently in place at the facility?

_____ Yes __X__ No

a) If no, please describe the new functions to be performed by the new equipment:

No, currently there are no functions being performed as the building is currently under construction.

b) What is the estimated value of the equipment to be purchased for which personal property tax abatement is being requested? $26,500,000

16. Complete the following profile of the Company that will occupy the property for which tax abatement is being requested:

a) Number of current full time permanent hourly employees by skill level (include average hourly wage rate excluding benefits and overtime)

Skilled None Average hourly wage rate for skilled positions Not applicable

Semi-skilled None Average hourly wage rate for semi-skilled positions Not applicable

Clerical None Average hourly wage rate for clerical positions Not applicable

Salaried None Average salary (per hour) for salaried positions Not applicable

TOTAL NUMBER OF EXISTING EMPLOYEES (permanent and full-time)
None. This will be a new facility.

b) Number of current part-time hourly employees by skill level (include average hourly wage rate excluding benefits and overtime)

Skilled None Average hourly wage rate for skilled positions Not applicable

Semi-skilled None Average hourly wage rate for semi-skilled positions Not applicable

Clerical None Average hourly wage rate for clerical positions Not applicable

TOTAL NUMBER OF EXISTING EMPLOYEES (part-time)
None. This will be a new facility.

c) Approximate value of benefits for existing and new employees on a per hour basis (e.g. benefits are valued at an additional $3.00 per hour, etc.) $4.00 per hour (on top of wages/salary)

d) Summary of benefits for existing and new employees.
Standard benefits are offered for qualifying employees including health insurance, dental insurance, vision insurance, 401K, etc.

e) Number of created full-time permanent hourly employees by skill level (include average hourly wage rate excluding benefits and overtime)

Skilled 0 Average hourly wage rate for skilled positions Not applicable

Semi-skilled 94 Average hourly wage rate for semi-skilled positions $15.42

Clerical 7 Average hourly wage rate for clerical positions $19.42

Salaried 19 Average salary (per hour) for salaried positions $32.40

TOTAL NUMBER OF NEW EMPLOYEES (permanent and full-time)
120

f) Number of created part-time hourly employees by skill level (include average hourly wage rate excluding benefits and overtime)

Skilled None Average hourly wage rate for skilled positions Not applicable

Semi-skilled None Average hourly wage rate for semi-skilled positions Not applicable

Clerical None Average hourly wage rate for clerical positions Not applicable

Salaried None Average salary (per hour) for salaried positions Not applicable

TOTAL NUMBER OF NEW EMPLOYEES (part-time)
None. All new employees will be full-time.

g) What is the total dollar amount to be spent on new salaries? $4,577,760 annually excluding benefits & bonuses. $5,493,312 annually including bonuses.

h) Provide schedule for when new employee positions are expected to be filled.
120 new full-time employees will be hired in calendar year 2017.

17. On a separate page, please give a detailed description of what the impact on your business will be if the new equipment is not installed (e.g. loss of jobs, contract cancellations, loss of production, change in location, etc.).

18. What is the term of the tax abatement requested (maximum 10 years). 10 years

19. Attach a schedule of the proposed tax abatement percentages in each year (note, if the proposed tax abatement schedule is other than a traditional tax abatement schedule the Town may impose additional fees for consideration).

Example (note this is a traditional 10 year abatement schedule)

Year	% of Assessed Value Exempt From Personal Property Taxes
1	100%
2	95%
3	80%
4	65%
5	50%
6	40%

7	30%
8	20%
9	10%
10	5%

20. Complete the following schedule concerning the proposed personal property taxes to be abated and include on a separate page the worksheets for calculating the figures provided below:

I. Projected Current Conditions Without Abatement

A. Current Annual Personal Property Taxes: $0
B. Projected 10-Year Total: $2,121,193

II. Projected Conditions With Abatement

A. Projected 10-Year Personal Property Taxes: $852,114
B. Projected 10-Year Abatement: $1,269,079

III. Projected Total (Assumes Abatement Granted)

A. Total Amount Abated: $1,269,079
B. Total Taxes to be Paid: $852,114

Note: Attach Worksheets

21. Which approvals or permits will be required for the project?

(a) zoning change
(b) annexation
(c) plat approval
(d) development plan
(e) variance
(f) special exception
(g) building permit
(h) other Current assumption is all relevant permits are in place.

22. Will additional public infrastructure/facilities be required? If so, please explain in detail costs/funding source and schedule for construction.
Our assumption is all current requisite infrastructure is in place at the proposed site.

23. For the proposed project, is the applicant requesting other incentives from the Town (e.g., tax increment financing, economic development revenue bond financing)? If so, please explain. No, the personal property tax abatement is the only requested incentive from the Town.

24. Please describe any community involvement/contributions the applicant has provided in the past and/or expects to provide in the future.

The applicant has a robust community involvement program wherever they have an operational presence. Beyond hiring locally, the company typically participates in some or all of the following activities: building playgrounds in disadvantaged areas, supporting local business, fundraising for local charities, etc. More detail on specific examples from other comparable existing facilities can be provided upon request.

25. Will local suppliers and contractors be used in the construction/operation of the proposed project? If so, please explain. Yes, where possible local suppliers and contractors are being used in the construction/ operation of the proposed project. If needed, specific examples can be provided.

26. Has the applicant previously been approved for economic development incentives from the Town (e.g., tax abatement, tax increment financing, economic development revenue bond financing)? If so, please explain and include information with respect to applicant's compliance with project representations made to the Town at the time the incentives were approved.

No, not applicable. This is the Company's first application for incentives in the Town. MWI had an already established presence prior to the 2015 acquisition.

27. Is the applicant current on all of its payment obligations to the Town and the County (e.g., property taxes, utility (gas, water, sewer, electric) fees (such as capacity fees, monthly services charges), guaranties on any debt obligations, etc.)?

This will be AmerisourceBergen Drug Company's first presence in the Town and the County. MWI, a wholly owned subsidiary, is current on all payment obligations.

28. Does the proposed project take advantage of any "green" technology to reduce adverse environmental impact? If so, please explain.

Yes, where operationally feasible the company takes advantage of "green" technology. This includes, but is not limited to energy efficient lighting, HVAC, and operational procedures. Given lower energy costs are beneficial to the Company's operational budget, emphasis is put on keeping energy usage and environmental impact as low as possible.

CHECKLIST OF ATTACHMENTS:

_____	Application Fee ($1,000)
_____	Completed Memorandum of Understanding
_____	Completed Form SB-1/PP
X	Legal Description of Project Site
X	Area Map of Project Site
X	Description of (i) Product(s) Manufactured, (ii) Research and Development, (iii) Product Distribution and/or (iv) Information Technology Conducted, at Site
X	Description of Equipment to be Installed at Site
X	Description of Impact on Business if Equipment not Installed
X	Worksheets for Abatement Calculation

I hereby certify that the information and representations on and included with this application for Personal Property Tax Abatement are true and complete.

I understand that if this request for property tax abatement is granted that I will be required to annually provide information to the Town with respect to compliance with the project description, job creation and retention figures (and associated salaries), investment, and other information contained in this application, including the Form SB-1/PP. I also acknowledge that failure to provide such information may result in a loss of tax abatement deductions.

Signature of Owner or Authorized Representative

ASST. SECRETARY
Title

JUNE 3, 2016
Date

STATE OF PA)
) SS:
COUNTY OF Chester)

Before me, the undersigned Notary Public, this 3rd day of June, 2016, personally appeared Daniel T. Hirst and acknowledged the execution of the foregoing application for personal property tax abatement for the Town of Whitestown, Indiana. In witness whereof, I have hereunto subscribed my name and affixed my official seal.

Jennifer Strohm
Jennifer Strohm, Notary Public
Residing in Chester County, PA

My commission expires:

November 20, 2019

COMMONWEALTH OF PENNSYLVANIA
NOTARIAL SEAL
JENNIFER STROHM, Notary Public
Tredyffrin Township, Chester County
My Commission Expires November 20, 2019