



# TREASURER-TAX COLLECTOR COUNTY OF SAN DIEGO

COUNTY ADMINISTRATION CENTER • 1600 PACIFIC HIGHWAY, ROOM 162  
SAN DIEGO, CALIFORNIA 92101-2477 • 1-877-829-4732 • FAX (619) 595-4626

Web site: <http://www.sdtreastax.com>

DAN McALLISTER  
Treasurer-Tax Collector



## UNCLAIMED PROPERTY TAX REFUND CLAIM FORM

Please complete this claim form if you have made an overpayment of property taxes and wish to claim a refund. The claim form and documentation supporting your claim must be returned to the County Tax Collector's office prior to the deadline appearing on the Refund Notice. Refund claims will be verified and, if valid and timely received, will, generally, be issued within 4 to 6 weeks after receipt of the claim. Mail completed claim form to: **San Diego County Treasurer-Tax Collector, ATTN: Financial Division / Property Tax Refund Claim, 1600 Pacific Highway, Room 162, San Diego, CA 92101.**

### CLAIMANT:

NAME OF PAYEE: \_\_\_\_\_ PARCEL/BILL NUMBER: \_\_\_\_\_

MAIL ADDRESS: \_\_\_\_\_

PHONE NUMBER: \_\_\_\_\_ EMAIL ADDRESS: \_\_\_\_\_

### GROUND(S) UPON WHICH THE CLAIM IS BASED:

I am Claiming the refund based on my standing as the (please check one):

Property Owner                      Mortgage Company                      Other (explain):

All claims will be verified to confirm the claimant is the party entitled to claim the refund. The claimant must provide documentation to support their standing as the party entitled to claim the refund. Failure to provide the required documentation may result in the claim being denied. See enclosed *Claim Signing Instructions* for information on who can sign the claim form, documentation required to support the claim, and information on when the refund will be issued.

### CLAIMANT'S ACKNOWLEDGMENT:

By my signature, below, I state that I am the rightful claimant to the overpayment of taxes made on the above-referenced parcel or bill number. I certify (or declare) under penalty of perjury that the foregoing is true and correct. I agree to indemnify and hold harmless the County of San Diego, its officers, and its employees from any loss resulting from the payment of this claim.

\_\_\_\_\_  
SIGNATURE OF CLAIMANT                      DATE

\_\_\_\_\_  
CITY OR TOWN WHERE SIGNED

\_\_\_\_\_  
PRINT NAME OF CLAIMANT

\_\_\_\_\_  
TITLE & COMPANY (IF APPLICABLE)

**IF THE REFUND IS OVER \$500, SIGNATURE(S) MUST BE NOTARIZED.**

(Notary Public Seal)

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

State of \_\_\_\_\_  
County of \_\_\_\_\_

Subscribed and sworn to (or affirmed) before me on this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_,  
by \_\_\_\_\_, proved to me on the basis of satisfactory evidence to be the  
person(s) who appeared before me.

Notary Public Signature: \_\_\_\_\_

# ESCHEATMENT

# CLAIM SIGNING INSTRUCTIONS

## WHO IS AUTHORIZED TO SIGN THE CLAIM FORM GUIDELINES

If the payee is a . . .	Who is authorized to sign the Claim	Required Minimum Documentation
<b>Individuals</b>	The payee named on the refund must sign the Claim. If there are multiple payees, then each payee named must sign the Claim.	Copy of current government-issued photo identification (e.g. Driver's license).
<b>Corporation</b>	The Claim must be signed by an authorized officer of the Corporation	Copy of the current <i>Statement of Information</i> for the Organization filed with the Secretary of State.  Resolution evidencing authority has been given to the named person(s) to act on behalf of the Organization to claim refunds.  Copy of signor's current government-issued photo identification (e.g. Driver's license).
<b>Limited Liability Company</b>	The Claim must be signed by an authorized officer of the LLC	Copy of the current <i>Statement of Information</i> for the Organization filed with the Secretary of State.  Resolution evidencing authority has been given to the named person(s) to act on behalf of the Organization to claim refunds.  Copy of signor's current government-issued photo identification (e.g. Driver's license).
<b>Partnership</b>	For General Partnerships or Limited Partnerships, the claim must be signed by a General Partner of the organization.	Copy of the current <i>Statement of Information</i> for the Partnership filed with the Secretary of State.  Resolution evidencing authority has been given to the named person(s) to act on behalf of the Organization to claim refunds.  Copy of signor's current government-issued photo identification (e.g. Driver's license).
<b>Trust</b>	The Claim must be signed by each Trustee of the Trust	Copy of the Trust document stating the name of the trust and name(s) of each trustee.  Copy of current government-issued photo identification (e.g. Driver's License off the individual filing the claim).
<b>Sole Proprietorship</b>	The Claim must be signed by the owner of the business.	Copy of the current Business License.  Copy of signor's current government-issued photo identification (e.g. Driver's license).
<b>Government Agency</b>	The Claim must be signed by an officer of the Agency.	A business card evidencing the signor's position and contact information within the Agency.
<b>Estate / Deceased Payee</b>	The Claim must be signed by the Administrator or Executor of the Estate.	Copy of the Letters of Administration filed and approved by the Probate Court.  Copy of Death Certificate  Copy of signor's current government-issued photo identification (e.g. Driver's license).

## **REQUIRED SUPPLEMENTAL DOCUMENTATION**

Additional documentation may be required before the Claim is processed and the refund issued.

### **PROOF OF ACQUISITION OR MERGER**

If the refund is payable to an organization or agency that has been acquired by, or merged with, another company, the acquiring company must provide legal evidence of such acquisition or merger.

Proof may also be required to show that the acquiring company has legal right and interest in the property or property tax payment creating the refund.

### **UNPROBATED AND INTESTATE ESTATES OF DECEASED PERSONS**

If the refund is payable to a deceased person who did not have a will or whose estate has not been probated, the required documentation will include the name(s) and contact information of all heirs, copies of birth, marriage, and death certificates. An Affidavit may also be required attesting to the facts of the decedent's estate.

### **HEIR, ASSET FINDERS AND OTHERS ACTING AS AGENT FOR THE PAYEE**

A payee may, but is not required, to utilize a third-party (such as an asset recovery or heir finder company) to file a Claim for refund.

If a payee elects to utilize a third-party agent to file a Claim for refund the following documentation is required:

1. A notarized Specific Power of Attorney disclosing the amount of the refund and authorizing the third-party to file a Claim with San Diego County.
2. A copy of the Agreement between the third-party and the payee.
3. The documentation required for the payee (see Chart) to evidence the identity of the party making the Agreement and granting authority to the third party is the party entitled to the refund.

## **CLAIM SUBMISSION AND REVIEW**

The completed Claim(s), required identification of parties, and other required supporting documentation should be mailed or delivered to:

SAN DIEGO COUNTY TREASURER-TAX COLLECTOR  
ATTN: FINANCIAL DIVISION / PROPERTY TAX REFUND CLAIM  
1600 Pacific Highway, Room 162  
San Diego, CA 92101

## **WHEN WILL THE REFUND BE ISSUED?**

**Refunds will be issued after the Claim filing deadline has passed** to allow all claimants the opportunity to file a Claim.

Refunds will be issued to the party shown as the payee on the Refund Notice and Unclaimed Refunds List that either held an ownership interest in the property or was the party who made the payment that created the refund.

## **QUESTIONS?**

Please visit our website at [www.sdtreastax.com/content/ttc/en/tax-collection/property-tax-refunds.html](http://www.sdtreastax.com/content/ttc/en/tax-collection/property-tax-refunds.html) for a list of unclaimed refunds, general information, and Frequently Asked Questions. If you have any questions regarding the submission of an Unclaimed Property Tax Refund Form, call (619) 531-5813 for further assistance.