



TREASURER-TAX COLLECTOR SAN DIEGO COUNTY

www.sdttc.com

Dan McAllister
Treasurer-Tax Collector



Estate of Deceased Claim Form

Name of Claimant: _____ Amount of Claim: _____

Claimant's Address: _____ Claimant's Phone Number: _____

Claimant's Mailing Address (if different from above): _____

Decedent's Name: _____ Claimant's Relationship to the Decedent: _____

Please check **one** of the following:

- ☐ No proceeding is now being or has been conducted in California for administration of the decedent's estate.
- ☐ The decedent's personal representative has consented in writing to the payment, transfer, or delivery to the affiant or declarant of the property described in the affidavit or declaration.

I hereby certify that I am entitled to the funds on deposit. I declare under penalty of perjury that the foregoing information is correct and that the documents I have submitted are either originals or true copies of originals.

Signature of Claimant _____ Date: _____

(A) Attach the following documents that evidence your relationship to the decedent or proof that you are the legally appointed personal representative of the decedent and that prove your right to the funds on deposit:

- A copy of the decedent's will, if any,
- decedent's death certificate;
- marriage certificate, if you are the decedent's spouse;
- your birth certificate, if you are the decedent's child
- or that otherwise establish, with documentary proof, the existence of a blood or legal relationship to either the decedent or his or her predeceased spouse, if any, that proves your right to the funds on deposit.

The documentary proof, if regular on its face, need not be certified.

(B) At least forty (40) days must have elapsed since the death of the decedent.

(C) Provide reasonable proof of your identity for purposes of this declaration as follows:

- Execute this declaration in the presence of Treasurer-Tax Collector staff; **AND** provide:
 - An identification card or driver's license issued by the Department of Motor Vehicles of this state that is current or was issued during the preceding five years.
 - A passport issued by the Department of State of the United States that is current or was issued during the preceding five years.
 - Any of the following documents that is current or was issued in the previous five years and contains a photograph, description of the person, is signed by the person and bears a serial or other identifying number:
 - A passport issued by a foreign government that has been stamped by the United States Immigration and Naturalization Service.
 - A driver's license issued by a state other than California.
 - An identification card issued by a state other than California.
 - An identification card issued by any branch of the armed forces of the United States.

If you are unable to execute this declaration in the presence of Treasurer-Tax Collector staff, a notary public's certificate of acknowledgement identifying you as the person executing the declaration is reasonable proof of identity.

For TTC Staff Use Only

I _____ certify that on _____ the claimant named above presented me with a
Printed Name of TTC Employee Initials Date
photo identification in the form of _____ that meets the requirements of Section (C) above.
(ID card, driver's license, passport, other)

TTC Staff - Attach a clear photocopy of the identification presented to you to the back of this sheet.

Note: All documentation submitted to the County of San Diego may be subject to disclosure under public records laws.

RETURN THE COMPLETED CLAIM FORM AND SUPPORTING DOCUMENTATION TO:

refunds@sdcounty.ca.gov OR

San Diego County – Treasurer-Tax Collector, 1600 Pacific Highway, Room 162, San Diego, CA 92101-2475