



MARION COUNTY BOARD OF COMMISSIONERS

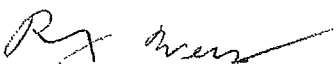
## Board Session Agenda Review Form

Meeting date: 2/20/2019

Department: Tax Office Agenda Planning Date: 2/14/2019 Time required: 15 Mins

☐ Audio/Visual aids N/A

Contact: Natasha McVey, Tax Collector Phone: 503-588-5215 Ext. 2244

Department Head Signature: 

**TITLE** Consideration of Board Order authorizing the property tax refund requested in the petition for refund of CoreLogic Commerical Real Estate Services, Inc.

**Issue, Description & Background** CoreLogic Commercial Real Estate Services, Inc. erroneously paid \$27,571.31 to satisfy property taxes on an account where only \$1576.38 was owed. ORS 311.806(1) requires the county governing body to issue refunds in situations like this. The total amount of the refund due is \$25,994.93. The Board has delegated authority to issue tax refunds under \$15,000 to the tax collector; all others must go to the Board for approval. By statute, no interest is due on this refund.

**Financial Impacts:** The amount of the refund is \$25,994.93.

**Impacts to Department & External Agencies** None, beyond the processing of the refund itself.

**Options for Consideration:** 1. Authorize the property tax refund to CoreLogic Commercial Real Estate Services, Inc., pursuant to the terms of the petition for refund; 2. Take no action at this time.

**Recommendation:** It is recommended that the Board authorize the property tax refund to CoreLogic Commercial Real Estate Services, Inc. at this time.

**List of attachments:** 1. Property tax petition for refund of CoreLogic Commercial Real Estate Services, Inc., with supporting documentation.  
2. Board Order.

**Presenter:** Natasha McVey, Tax Collector

*Copies of completed paperwork sent to the following: (Include names and e-mail addresses.)*

**Copies to:** Natasha McVey (NMcvay@co.marion.or.us); Noah Olson (NOlson@co.marion.or.us); Scott Norris (SNorris@co.marion.or.us)



Tax Account: **R62696**

MARION COUNTY BOARD OF COMMISSIONERS  
C/O MARION COUNTY TAX COLLECTOR  
PO BOX 2511  
SALEM, OR 97308-2511

**REFUND PETITION**

**PETITIONER:** CORELOGIC TAX SVCS-COML  
PO BOX 9222  
COPPELL, TX 75019

Petitions the Board of County Commissioners for a refund under ORS 311.806 of taxes paid on REAL property.

Tax Account	Tax Year	Tax Amount	Interest through	Refund Amount
R62696	2018	\$25,994.93	\$ .00	\$25,994.93

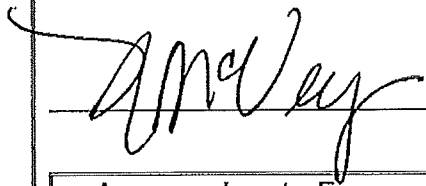
**REASON FOR REFUND:**

See Attached File. This refund is the result of an overpayment/error by the lender/escrow company.

**TOTAL REFUND REQUESTED:** \$25,994.93

Signed: See Attached File

Petition verified and refund recommended:



, Marion County Tax Collection Dept. Date: 02/08/19

Approved as to Form

Legal Counsel

PropertyTax - RE: Check #6116775 - 2/15/2019 Tax

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**From:** "Garcia, Roberto" <robgarcla@corelogic.com>  
**To:** "Gonzales, Frank D" <fdgonzales@corelogic.com>, "PropertyTax@co.marion.o...  
**Date:** 2/8/2019 8:49 AM  
**Subject:** RE: Check #6116775 - 2/15/2019 Tax

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Hi Natasha,

Per our conversation yesterday, we did report the incorrect amount in error. Can you please issue a refund to CoreLogic for the overage to the address below. Sorry for the inconvenience.

CoreLogic Refunds  
P.O. Box 9222  
Coppell, TX 75019

Please let me know if you have any questions.

Thanks,  
Roberto Garcia

**From:** Gonzales, Frank D  
**Sent:** Thursday, February 7, 2019 1:48 PM  
**To:** Garcia, Roberto <robgarcla@corelogic.com>  
**Subject:** FW: Check #6116775 - 2/15/2019 Tax

**From:** PropertyTax <PropertyTax@co.marion.or.us>  
**Sent:** Thursday, February 7, 2019 1:40 PM  
**To:** Gonzales, Frank D <fdgonzales@corelogic.com>  
**Subject:** Re: Check #6116775 - 2/15/2019 Tax

[External Content] This message is from an external source. Please exercise caution when opening attachments or links.

Hi Frank;

I just left a voice message for you. Please double-check the account number R62696 to see why CoreLogic sent \$27,571.31 for a tax payment when only \$1,576.38 was due.

The base amount, for the 2018-19 tax year was only \$2,364.58. There is an error or omission, somewhere.

Hopefully, you can provide another account that the overage of \$25,994.93 can be applied (after applying the remaining balance of \$1,576.38 that was due - now pd in full). If not, you have 2 options: 1 - wait for several weeks/months for a refund to be issued (CoreLogic tends to take a while to respond to refund requests) or 2 - place a stop-payment on your check # and reissue payment in the correct amount. Also, due to the large amount of the overage, once CoreLogic

948 XXX

responds to the refund request, it has to be approved by the Marion County Board of Commissioners - which will add more time to the refund process.

Please feel free to contact this office with any questions. If I am not available, whoever answers the phone should be able to assist you.

Thank you,

Natasha

Marion County Tax Collector's Office

Mailing Address: PO Box 2511, Salem OR 97308

Street Address: 555 Court St NE Room 2242, Salem OR 97301

[www.co.marion.or.us/AO/TAX/](http://www.co.marion.or.us/AO/TAX/)

Phone: [503-588-5215](tel:503-588-5215)

Fax: [503-566-3911](tel:503-566-3911)

>>> On 2/7/2019 at 11:19 AM, in message  
<[DM6PR10MB3241929614484FEAC4AAE7B3C5680@DM6PR10MB3241.namprd10.prod.outlook.com](mailto:DM6PR10MB3241929614484FEAC4AAE7B3C5680@DM6PR10MB3241.namprd10.prod.outlook.com)>,  
"Gonzales, Frank D" <[fdgonzales@corelogic.com](mailto:fdgonzales@corelogic.com)> wrote:

Hi Natasha,

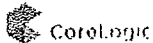
Please find enclosed, payment disbursement list for this check you received and contacted us about. Please confirm upon receipt.

Thank you.

Frank Gonzales

Sr Assoc, Operation Svcs

CoreLogic



Direct (817) 699-8029

[fdgonzales@corelogic.com](mailto:fdgonzales@corelogic.com)

[corelogic.com](http://corelogic.com) | [Blog](#)

[LinkedIn](#) | [Twitter](#) | [Facebook](#) | [Google+](#)

Our Vision: Deliver unique property-level insights that power the global real estate economy

\*\*\*\*\*

This message may contain confidential or proprietary information intended only for the use of the addressee(s) named above or may contain information that is legally privileged. If you are

Property: R62696

\*\*\* Marion County OTC Account Summary \*\*\*

Page 1 of 1

Printed at: 09:06am 02/08/19

Owner Address:

EQUITY WEST LTH POOL II LLC (6379 Property: R62696 072W08BB07400 92400213  
1761 3RD ST #103 VILLAGE EAST ESTATES, BLOCK 1, LOT  
NORCO, CA 92860 21, ACRES 0.161

Situs Address:

4345 VERNON LOOP NE  
SALEM, OR 97305

INTEREST AND DISCOUNTS BASED ON A PAYMENT DATE ON OR BEFORE 02/15/2019

\*\*\* Certified Values \*\*\*

Certified Values for:2018

Land Value: \$70,000  
Improvement Value: \$134,060  
LSU Market Value : \$0  
LSU Use Value : \$0  
Real Market Value: \$204,060  
M50 Assd Value : \$138,550

\*\*\* (Unpaid Only) Fees, Bills & Refunds \*\*\*

\*\*\* Refunds Due on this Property Record \*\*\*

ID#	Refund ID	Payee Name	Ref Code	Overage	Ref Int	Refund Due
1.	2018.2654	CORELOGIC COMMERCIAL	OP	25,994.93	0.00	25,994.93

\*\*\* No taxes are due on this property \*\*\*

## - - Property Payment Summary (R62696) - -

With Reversals

072W08BB07400 EQUITY WEST LTH POOL II LLC  
 VILLAGE EAST ESTATES, BLOCK 1, LOT 21, ACRES 0.161

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Bill 2017.162522      Levied Tax: 2,011.92
#  Yr Batch      Receipt      Tax      Int/Disc      Amount Paid      DatePaid
36. 17 CLC1113    12250599.1      670.64
37. 17 AKD0215    12322253.2      670.64
38. 17 AKD0511    12329784.3      670.64
    17 TOTAL TAX PAID 2017      2,011.92      0.00      2,011.92
-----
Bill 2018.162837      Levied Tax: 2,364.58
#  Yr Batch      Receipt      Tax      Int/Disc      Amount Paid      DatePaid
39. 18 CLC1115    12419411.1      788.20
40. 18 AKD0207    12453548.4      1,576.38
41. 18 OP AKD0207  12453548.5      25,994.93
    18 TOTAL TAX PAID 2018      2,364.58      0.00      2,364.58
*** End of List ***
  
```

Enter 'S' to Show without reversals, "#" to view Receipt, scroll command,  
 or <RET> to Exit: \_\_\_\_\_

- - Receipt Maintenance (12453548) - -

Receipt ID: 12453548                      Date Paid        : 02/07/19  
1. Pay Method: CK 6116775                Batch ID        : AKD020719  
2. Payer Name: CORELOGIC COMMERCIAL REAL ESTATE    Posting Date : 02/07/19  
    Address 1: MULTI ACCTS               Distributed     : 02/28/19  
    Address 2: PO BOX 9222                Amount Paid   : \$30,033.59  
    Address 3:                            Amt. Tendered: \$30,033.59  
    City, ST Zip: COPPELL, TX 75019       Date Printed :  
3. Receipt Cd:                            5. Escrow #:

4. Comment : POSTED AS INSTRUC; PAYER CALC; LOAN NUM FOR R62696 IS+  
Property/Owner/Legal                      TR#            Bill ID    Amount Paid  
Property ID: R94794 083W23BB80003        3            2018.206026        690.31  
EQUITY WEST LTH POOL II LLC  
TOKETIE VILLAGE CONDOMINIUMS, LOT 3  
Property ID: R62696 072W08BB07400        4            2018.162837        1,576.38  
EQUITY WEST LTH POOL II LLC               5            2018.2654        25,994.93  
VILLAGE EAST ESTATES, BLOCK 1, LOT 21, ACRES 0.161  
\*\*\* End of Display, Enter 'C' to Redisplay Screen \*\*\*

Enter Field#, 'P'-Print Receipt, 'U'-Print Receipt & Summary,  
'V'-Reverse Receipt, 'D'-Pynt Table, 'CM'-Comment, or <RET> to Exit: \_



**CoreLogic Commercial Real Estate Services, Inc.**

RESIDENTIAL INVESTMENT (MLS)

PO Box 9222

Coppell, TX 75019-9240

(888) 988-0939

PNC Bank, N.A.

Jeannette, PA.

60-162/433

Check Date	Check Number
01-Feb-2019	
Check Amount	
30,033.59	

Pay Thirty Thousand Thirty Three Dollars and 59/100 Cents\*\*\*\*\*


VOID AFTER 90 DAYS FROM DATE OF ISSUE

To The MARION COUNTY - TAX COLLECTOR

Order Of MARION COUNTY

PO BOX 2511

SALEM, OR 97308



R 67691

CTS010  
2/4/2019**MEMORANDUM TAX STATEMENT***Residential Investment (MLS) (5943)*

PAYOR'S MAILING ADDRESS: CoreLogic Commercial Tax Services  
Comm RE Tax  
PO Box 9222  
Coppell, TX 75019-9240

PHONE: 888-988-0939

**PROPERTY INFORMATION**

PROP ID NUM: R62696  
TAX ID NUM: R62696  
PROPERTY LOCATION: 4345 VERNON LOOP NE  
SALEM, OR 97305  
DESCRIPTION: ACRES: 0.1607 / VILLAGE EAST ESTATES, BLOCK 1, LOT 21, ACRES 0.161 / MAP:  
072W08BB07400  
BORROWER/OWNER: VANTAGE HOMES LLC

LOAN NUM: 030297034

**TAXING INFORMATION**

TAXING ENTITY: MARION COUNTY  
DUE DATE: 02/15/2019  
GOOD THRU: 02/15/2019  
TAX YEAR: 2018  
PHONE: 503-588-5215  
BILL NUMBER:  
INSTALLMENT: 3.2

BASE TAX: \$27,571.31  
INTEREST/FEEs/LIENS: \$0.00  
DISCOUNT: \$0.00  
PREVIOUS PAYMENT: \$0.00  
AMOUNT DUE: \$27,571.31

CHECK NUMBER: 6116775

COMMENTS:

**PAYMENT INFORMATION**

MAKE CHECK PAYABLE TO: MARION COUNTY - TAX COLLECTOR

REMIT PAYMENT TO: MARION COUNTY  
PO BOX 2511  
SALEM, OR 97308

FUTURE BILLS AND CONTACT INFORMATION



BEFORE THE BOARD OF COMMISSIONERS

FOR MARION COUNTY, OREGON

In the matter of approving property       )  
tax refund as submitted by the       )  
Marion County Tax Collector.       )

**Order No.**

This matter came before the Board of Commissioners upon the recommendation of the Marion County Tax Collector regarding a tax refund petition on account no. R62696, attached hereto and incorporated herein by this reference; and

WHEREAS, the Board finds that the petitioner has demonstrated that a tax refund is due in the amount as set forth on the petition; and

WHEREAS, the Board finds that the Marion County Tax Collector approved the refund as to the amount; and

WHEREAS, the Board finds that Marion County Legal Counsel has approved the refund as to legal form,

NOW, THEREFORE, IT IS HEREBY ORDERED that a refund be made to the petitioner on account no. R62696 in the amount indicated on the petition.

DATED this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_.

MARION COUNTY BOARD OF COMMISSIONERS

\_\_\_\_\_  
Chair

\_\_\_\_\_  
Commissioner

\_\_\_\_\_  
Commissioner

