



MARION COUNTY BOARD OF COMMISSIONERS

Board Session Agenda Review Form

Meeting date: January 17, 2024

Department: Tax Office

Title: Property tax refund for Advantage Self Storage

Agenda Planning Date: 1/4/24 Management Update/Work Session Date: Audio/Visual aids []

Time Required: 15 min. Contact: Austin Fowler - Tax Collector Phone: ext. 2244

Requested Action: Approve an order authorizing a property tax refund for Advantage Self Storage.

Issue, Description & Background: The Tax Collector received duplicate payments on account no. 511718 for the 2023-24 tax year. ORS 311.806(1) requires the county governing body to issue refunds in situations like this. The total amount of the refund due is \$26,397.39. The Board has delegated authority to issue tax refunds under \$20,000 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 \$26,397.39.

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

List of attachments: 1. Property tax petition for refund of Advantage Self Storage, with supporting documentation. 2. Board Order.

Presenter: Austin Fowler - Tax Collector

Department Head Signature: Natasha McVey

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. 511718, 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. 511718 in the amount indicated on the petition.

DATED this _____ day of _____ 20__.

MARION COUNTY BOARD OF COMMISSIONERS

Chair

Commissioner

Commissioner



Tax Account: **511718**

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

REFUND PETITION

PETITIONER: ADVANTAGE SELF STORAGE LLC
2586 GRAND VISTA DR
SPRINGFIELD OR 97477

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 N/A	Refund Amount
511718	2023	26397.39	N/A	26,397.39

REASON FOR REFUND:

ADVANTAGE SELF STORAGE MADE PROPERTY TAX PAYMENT IN ERROR AS WELL THEIR LENDER CORELOGIC

Signed: See Attached File

Petition verified and refund recommended:

Austin Fowler, Marion County Tax Collection Dept. Date 1/3/2024

Approved as to Form <u>Scott A. No</u> 1/3/24 Legal Counsel
--



TAX COLLECTION DEPARTMENT

Account Number: **511718**

Rex Weisner, Tax Collector

Phone: (503) 588-5215 Fax: (503) 566-3911

E-mail: PropertyTax@co.marion.or.us



December 4, 2023

Ref #: 1858514

CORELOGIC COMMERCIAL REAL ESTATE SERVICES INC
PO BOX 9222
COPPELL TX 75063

Account: 511718
Prop. Owners: SOJOURN ADVANTAGE SS LLC
Prop. Location: 4215 HIGHWAY 99E HUBBARD OR 97032
Map Tax Lot: 041W34BB00500
Amt. of Overage: \$26,397.39
Cause of Overage: DUPLICATE PMT

According to our records, the 2023 property taxes on the above account are overpaid.

Please advise this office in writing who should receive the refund. **Unless a response requesting this refund is received by December 27 2023, the refund will be issued to ADVANTAGE SELF STORAGE LLC, who also paid, according to their instructions.**

We urge you to give your prompt attention to this matter.

Sincerely,

Marion County Tax Collector
By Refund Clerk

RO102



TAX COLLECTION DEPARTMENT

Natasha McVey, Tax Collector
Phone: (503) 588-5215 Fax: (503) 566-3911
E-mail: ProperlyTax@co.marion.or.us

Account Number: **511718**



Ref #: 1858514

Nov 17 2023

PAYER A:
ADVANTAGE SELF STORAGE LLC ✓
2586 GRAND VISTA DR
SPRINGFIELD OR 97477

RECEIVED

NOV 30 2023

MARION COUNTY
TAX COLLECTOR

PAYER B:
CORELOGIC COMMERCIAL REAL ESTATE SERVICES INC
PO BOX 9222
COPPELL TX 75063

Account: **511718**
Prop. Owners: SOJOURN ADVANTAGE SS LLC
Prop. Location: 4215 HIGHWAY 99E HUBBARD OR 97032
Map Tax Lot: 041W34BB00500
Amt. of Refund: **\$26,397.39**
Cause of Overage: **DUPLICATE PMT**

We have received, **and applied 2023** property tax payments from both payers, noted above. The amount of **\$26397.39** will be refunded to only one party. **[NOTE: Refund amounts cannot be altered.]**

We recommend that you contact the other payer, shown above, then notify us *in writing* as to who should receive the refund, *even if it is not one of the payers listed above.* We need **written refund instructions from both parties that paid. Please sign and return this notice to the Tax Collection Department.**

Please refund this overage to the following name and address:

Advantage Self Storage

P.O. Box 201

Hubbard, OR 97032

Signed: X Jud B Date: 11-29-23

20102

