



MARION COUNTY BOARD OF COMMISSIONERS

Board Session Agenda Review Form

Meeting date: January 17, 2024
Department: Tax Office

Title: Property tax refund for Hacienda West LLC

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

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

Requested Action: Approve an order authorizing a property tax refund for Hacienda West LLC.

Issue, Description & Background: The Tax Collector received duplicate payments on account no. 572743 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 \$40,877.65. 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 \$40,877.65.

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

List of attachments: 1. Property tax petition for refund of Hacienda West LLC, 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. 572743, 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. 572743 in the amount indicated on the petition.

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

MARION COUNTY BOARD OF COMMISSIONERS

\_\_\_\_\_  
Chair

\_\_\_\_\_  
Commissioner

\_\_\_\_\_  
Commissioner



Tax Account: **572743**

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

**REFUND PETITION**

**PETITIONER:** HACIENDA WEST LLC  
PO BOX 5387  
EUGENE OR 97405

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
572743	2023	\$40,877.65	N/A	\$40,877.65

**REASON FOR REFUND:**

PROPERTY OWNER MADE PAYMENT IN ERROR AS WELL AS THEIR LENDER CORELOGIC.

Signed: See Attached File

Petition verified and refund recommended:

Austin Fowler, Marion County Tax Collection Dept. Date 12/28/2023

Approved as to Form <i>Scott A. Now</i> 12/28/23 Legal Counsel
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## TAX COLLECTION DEPARTMENT

Account Number: **572743**

Natasha McVey, Tax Collector

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

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



December 6, 2023

Ref #: 1858524

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

Account: 572743  
Prop. Owners: HACIENDA WEST LLC  
Prop. Location: 345 MADRONA AVE SE SALEM OR 97302  
Map Tax Lot: 083W03BC08000  
Amt. of Overage: \$40,877.65  
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 the PROPERTY OWNER, 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

0103  
BOC



**TAX COLLECTION DEPARTMENT**

Account Number: **572743**

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



Nov 17 2023

Ref #: 1858524

**PAYER A:**  
HACIENDA WEST LLC ✓  
PO BOX 5387  
EUGENE OR 97405

RECEIVED IN DROPBOX

NOV 27 2023

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

MARION COUNTY  
TAX COLLECTOR

Account: **572743**  
Prop. Owners: HACIENDA WEST LLC  
Prop. Location: 345 MADRONA AVE SE SALEM OR 97302  
Map Tax Lot: 083W03BC08000  
Amt. of Refund: **\$40,877.65**  
Cause of Overage: **DUPLICATE PMT**

We have received, **and applied 2023** property tax payments from both payers, noted above. The amount of **\$40877.65** 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:**

Hacienda West LLC  
PO Box 5387  
Eugene OR 97405

Signed: X 

Date: 11/27/2023

LTR

Marion County Tax Collector  
Refund #11436 Summary

Account # 572743 Roll R Code Area 24010

Tax Id 572743

Owner  
HACIENDA WEST LLC  
MADRONA PLACE APTS  
PO BOX 5387  
EUGENE OR 97405

Payee  
HACIENDA WEST LLC  
PO BOX 5387  
EUGENE OR 97405

Lender

Situs 345 MADRONA AVE SE SALEM OR 97302

Reason DUPLICATE PMT

Refund Details

Year	Refund Amount	Refund Interest	Refund Total
2023	\$40,877.65	\$0.00	\$40,877.65
<b>Total</b>	<b>\$40,877.65</b>	<b>\$0.00</b>	<b>\$40,877.65</b>

Check # Comment DUPLICATE PMT; 2023-24 PROP TAXES

Tax History

Year	Tax Type	Total Due	Current Due	Original Due	Due Date
2023	ADVALOREM	(\$40,877.65)	(\$40,877.65)	\$42,141.91	15-Nov-2023

Balance As Of 11/17/2023 (\$40,877.65)

Tax Adjustments

Year	Discount	Adv Interest	Tax Credit
2023	\$0.00	\$0.00	\$40,877.65

Payment History

R #	Year	Date	Payer	Amount
3900064	2023	16-Nov-2023	CORELOGIC COMMERCIAL REAL ESTATE SERVICES INC	\$40,877.65

Comments LTR; H/O PD VIA RLB WITH CHECK NO 0073984666