



MARION COUNTY BOARD OF COMMISSIONERS

Board Session Agenda Review Form

Meeting date: March 20, 2024

Department: Tax Office

Title: Property tax refund for Liberty Street Partners LLC

Management Update/Work Session Date: _____ Audio/Visual aids ☐

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

Requested Action: Adopt an order authorizing a property tax refund for Liberty Street Partners LLC.

Issue, Description & Background: The Tax Collector received duplicate payments on tax account 573142 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 \$20,775.87. 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 \$20,775.87.

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

List of attachments: 1. Property tax petition for refund of Liberty Street Partners 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. 573142, 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. 573142 in the amount indicated on the petition.

DATED this _____ day of _____, 20____.

MARION COUNTY BOARD OF COMMISSIONERS

Chair

Commissioner

Commissioner



Tax Account: **573142**

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

REFUND PETITION

PETITIONER: LIBERTY STREET PARTNERS LLC
2735 12TH ST SE
SALEM OR 97302

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
573142	2023	\$20,775.87	N/A	\$20,775.87

REASON FOR REFUND:

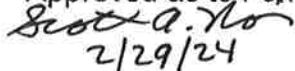
DUPLICATE PAYMENT MADE BY BOTH HOME OWNER AND LENDER. LENDER AGREED TO SEND REFUND TO PROPERTY OWNER.

Signed: See Attached File

Petition verified and refund recommended:

, Marion County Tax Collection Dept. Date 2/27/2024

Approved as to Form


2/29/24

Legal Counsel

Natasha McVey

573142

From: TAX-RA-Commercial Refunds <CommercialRefunds@corelogic.com>
Sent: Friday, February 23, 2024 4:50 AM
To: PropertyTax; Treasurer
Cc: ISC-DL-Payment Processing Dallas Tax; Burroughs, Sondra
Subject: NOTICE TO CANCEL REQUEST - Loan Number 200149176 Parcel 573142 Ticket 0743-1675

Importance: High



WARNING: This email originated outside of Marion County.

DO NOT CLICK links or attachments unless you trust the sender and know the content is safe.

Hello,

I am a representative for CoreLogic. We were notified by our client that the borrower and CoreLogic made payments on parcel 573142. Currently the refund is being processed to CoreLogic. However, the property owner, Liberty St Prtn Llc An Oregon, is attempting to request the refund to be sent directly to them. Please cancel CoreLogic's request and process the refund in the amount of \$20,775.87 directly to the property owner. Please confirm delivery on this request? Thank you for your time and I look forward to your reply.

Client Ticket Note:

Spoke to Matthew at Marion County. Said both bwr & CoreLogic have requested refund. Need someone to cancel request. Borrower would like the refund. Therefore, please send NOTICE TO CANCEL REQUEST for refund from Marion County so refund will go directly to borrower. Please advise when completed so I can contact borrower.

Added By: Beverly Roberts

Parcel 573142

Tax year/Inst 2023 – 1

Liberty St Prtn LLC An Oregon

3312 Liberty Rd S, Salem, OR 97302

Client: JPMorgan Chase (9173)

Loan Number: 200149176

Marion County (Annual), OR

o Expected refund - \$20,775.87

Please send funds to:

Property Owner (Borrower)

Best wishes,

Effective January 11, 2024, please send all CoreLogic Commercial and National Tax Search refund inquiries to TAX-RA-Commercial Refunds CommercialRefunds@corelogic.com.



O R E G O N

TAX COLLECTION DEPARTMENT

Natasha McVey, Tax Collector

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

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

Account Number: **573142**



Ref #: 1858524

January 18, 2024

LIBERTY STREET PARTNERS LLC
2735 12TH ST SE
SALEM OR 97302

CORELOGIC TAX SVCS
PO BOX 9222
COPPELL TX 75063

Account: 573142
Prop. Owners: LIBERTY STREET PARTNERS LLC
Prop. Location: 3312 LIBERTY RD S SALEM OR 97302
Map Tax Lot: 083W03BC01200
Amt. of Overage: \$20,775.87
Cause of Overage: DUPLICATE PMT

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

However, LIBERTY STREET PARTNERS LLC and CORELOGIC TAX SVCS have sent conflicting instructions regarding the refund of this overage. ***Both payers have requested the refund, so one payer must withdraw their request.***

The refund will be issued more quickly when the two payers agree upon the recipient of the overage.

We urge you to please discuss this matter with the other payer listed above and determine who should receive the refund. A written response is requested from both parties before the refund can be processed.

Please give this matter your prompt attention.

Sincerely,

Marion County Tax Collector
By Refund Clerk

**TAX COLLECTION DEPARTMENT**Account Number: **573142**

Rex Weisner, Tax Collector

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

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



January 5, 2024

Ref #: 1858524

LIBERTY STREET PARTNERS LLC
2735 12TH ST SE
SALEM OR 97302

RECEIVED

JAN 17 2023

Marion
TAX

Account: 573142
Prop. Owners: LIBERTY STREET PARTNERS LLC
Prop. Location: 3312 LIBERTY RD S SALEM OR 97302
Map Tax Lot: 083W03BC01200
Amt. of Overage: \$20,775.87
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 January 23, 2024, the refund will be issued to CORELOGIC TAX SVCS, 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

PLEASE MAKE OUT TO LIBERTY STREET PARTNERS, LLC
2735 12TH STREET SE
SALEM OR 97302

20130



O R E G O N

TAX COLLECTION DEPARTMENT

Natasha McVey, Tax Collector

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

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

Account Number:

573142



23

DEC 14 2023

Nov 17 2023

Ref #: 1858524

PAYER A:

CORELOGIC COMMERCIAL REAL ESTATE SERVICES INC ✓

PO BOX 9222

COPPELL TX 75063

PAYER B:

LIBERTY STREET PARTNERS LLC

2735 12TH ST SE

SALEM OR 97302

Account: **573142**

Prop. Owners: LIBERTY STREET PARTNERS LLC

Prop. Location: 3312 LIBERTY RD S SALEM OR 97302

Map Tax Lot: 083W03BC01200

Amt. of Refund: **\$20,775.87**

Cause of Overage: **DUPLICATE PMT**

We have received, **and applied 2023** property tax payments from both payers, noted above. The amount of **\$20775.87** 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:

Corelogic tax services LLC

PO BOX 9202, copell, Tx. 75019

Signed: **X**

Janet Daouza

Date: 02/01/2024

**Marion County Tax Collector
Refund #11438 Summary**

Account# 573142 Roll R Code Area 24010

Tax Id 573142

Owner

LIBERTY STREET PARTNERS LLC
VISTA TERRACE
2735 12TH ST SE
SALEM OR 97302

Payee

LIBERTY STREET PARTNERS LLC
2735 12TH ST SE
SALEM OR 97302

Lender

Situs 3312 LIBERTY RD S SALEM OR 97302

Reason DUPLICATE PMT

Refund Details

Year	Refund Amount	Refund Interest	Refund Total
2023	\$20,775.87	\$0.00	\$20,775.87
Total	\$20,775.87	\$0.00	\$20,775.87

Check # **Comment** DUPLICATE PMT; 2023-24 PROP TAXES

Tax History

Year	Tax Type	Total Due	Current Due	Original Due	Due Date
2023	ADVALOREM	(\$20,775.87)	(\$20,775.87)	\$21,418.42	15-Nov-2023

Balance As Of 11/17/2023 (\$20,775.87)

Tax Adjustments

Year	Discount	Adv Interest	Tax Credit
2023	\$0.00	\$0.00	\$20,775.87

Payment History

R #	Year	Date	Payer	Amount
3900064	2023	16-Nov-2023	CORELOGIC COMMERCIAL REAL ESTATE SERVICES INC	\$20,775.87

Comments LTR; H/O PD VIA RLB WITH CHECK NO 1354