



NEWS RELEASE

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Board Approves Automatic Property Tax Refunds

SAN BERNARDINO—Most San Bernardino County property owners won't have to fill out forms to get their property tax refunds thanks to opt-in legislation the Board of Supervisors approved via resolution on Tuesday.

"The County knows which property owners are due a refund and how much they are owed, so why should they have to fill out a form to let the County know they want their money back?" asked Second District Supervisor Janice Rutherford, who suggested the Board adopt SB 1246 (Gaines-R).

The bill, which went into effect in January, authorizes counties to issue a refund to a property owner without a claim for refund if both of the following conditions are met: (1) There has been no transfer of the property during or since the fiscal year for which the taxes subject to refund were levied, and (2) The amount of the refund is less than five thousand dollars (\$5,000).

Counties are required to adopt a resolution or ordinance approving the tax refund provision, which is codified in California Revenue and Taxation Code §5105.

Supervisor Rutherford recommended adopting the law during a Board meeting in December where Supervisors approved transferring \$9 million in unclaimed property tax refunds to the General Fund.

Property tax refunds are typically triggered when a county assessor changes the assessed value on properties to match their market values. The county auditor determines if the change requires the issuance of refunds or if the owners owes more in taxes.

If a refund is warranted, the auditor sends the property owner a claim form to fill out and return in order to get the refund. When refunds are not claimed within four years, California law authorizes county boards of supervisors to move the unclaimed money into their counties' general funds.

"By opting into this legislation, we're getting rid of that extra paperwork and sending the refund directly to taxpayers," Rutherford said.