SAN BERNARDINO COUNTY

CLAIM FOR REFUND OF OVERPAYMENT OF DOCUMENTARY TRANSFER TAX

To: San Bernardino County Recorder-Clerk I, the undersigned, do hereby certify that, pursuant to County Ordinance No. 1394 of County of San Bernardino, State of California, as amended by Ordinance No. 1430, I have paid the sum of \$________in real property transfer tax to the County of San Bernardino on the following described document: (Document Title, i.e. Deed, Agreement, etc.) Document Number of Official Records. I request a refund for the sum of \$______as provided in Section 11934 of the Revenue and Taxation Code for the following reason(s): For additional space, add a page and provide all supporting documentation. I hereby certify under penalty of perjury the foregoing is true and correct and that a refund of said payment has not been previously made. Dated and executed this day of , 20 , at am/pm. Claimant Affidavit of Original Payee: Make refund payable to: Signature Charge Account Name Type or Print Name and Title Charge Account Number * Contact Number Email Address * Payments approved as refunds will appear as adjustments to existing charge accounts. In the absence of an active charge account, a check will be issued. This area is for use by the San Bernardino County Recorder's Office. It is recommended the request be: Approved______Denied_____Remarks:_____ RECORDS TECHNICIAN SUPERVISOR II: By Date: I have examined the within claim, and assuming the facts therein stated to be true, find it is a valid/invalid legal claim against the County. CHIEF DEPUTY RECORDER: Date:

San Bernardino County

Instructions for submitting the "Claim for Refund of Overpayment of Documentary Transfer Tax" form.

When completing the Refund Form, please ensure to complete each area entirely, adding as much information as possible.

When providing the reason(s) for the refund, please be very specific and as detailed as possible.

The following items must accompany the Request for Refund before it will be processed:

- 1. Certified Copy of Sale Escrow Instructions indicating the sale amount, which is the figure that the Documentary Transfer Tax is based. If Escrow Instructions are not available, then you must provide sufficient documentation to prove the sale amount and the amount of tax paid.
- 2. A copy of the Deed or Lease Statement that was recorded for which you are basing the Refund Request.
- 3. Per GC 54985 (a) there is a \$75.00 processing fee that is to be submitted with the Request for Refund.

The Claim for Refund Request form and supporting documentation may be mailed to our office at San Bernardino County Recorder 222 W. Hospitality Lane, San Bernardino, CA 92415-0022. To prevent delays in the processing of your request, please call our office at (855) 732-2575 for assistance if you have any questions.

Thank you,

Recorder Division
San Bernardino County