



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