



MARION COUNTY BOARD OF COMMISSIONERS

Board Session Agenda Review Form

Meeting date: January 13, 2021

Department: Tax Office Agenda Planning Date: 1/7/21 Time required: 15 min.

Audio/Visual aids

Contact: Natasha McVey, Tax Collector Phone: ext. 2244

Department Head Signature: Rex Weisner

TITLE Property tax refund for WAFD Bank

Issue, Description & Background The bank paid the taxes on the wrong account for the 2020-21 tax year. The account they intended to pay was 343299. After the payment was credited to account 343299, there was an overpayment balance to be refunded. ORS 311.806(1) requires the county governing body to issue refunds in situations like this. The total amount of the refund due is \$34,147.99. The Board has delegated authority to issue tax refunds under \$15,000 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 \$34,147.99.

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

Options for Consideration: 1. Authorize the property tax refund to WAFD Bank, pursuant to the terms of the petition for refund; 2. Take no action at this time.

Recommendation: It is recommended that the Board authorize the property tax refund to WAFD Bank at this time.

List of attachments: 1. Property tax petition for refund of WAFD Bank, with supporting documentation. 2. Board Order.

Presenter: Natasha McVey, Tax Collector

Copies of completed paperwork sent to the following: (Include names and e-mail addresses.)

Copies to: Natasha McVey, NMcvEy@co.marion.or.us; Scott Norris, snorris@co.marion. or.us

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. 343299, 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. 343299 in the amount indicated on the petition.

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

MARION COUNTY BOARD OF COMMISSIONERS

\_\_\_\_\_  
Chair

\_\_\_\_\_  
Commissioner

\_\_\_\_\_  
Commissioner



Tax Account: **343299**

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

**REFUND PETITION**

**PETITIONER:** WAFD BANK  
9929 EVERGREEN WAY  
EVERETT WA 98204

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	Refund Amount
343299	2020	34,147.99	N/A	\$ 34,147.99

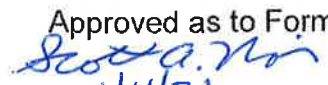
**REASON FOR REFUND:**

WAFD BANK MISKEYED THE ACCT THEY WANTED TO PAY. THE PROPER ACCT HAS NOW BEEN PAID AND THIS IS THE DIFFERENCE LEFT TO BE REFUNDED

Signed: See Attached File

Petition verified and refund recommended:

 , Marion County Tax Collection Dept. Date 12/31/2020

Approved as to Form  
  
 1/4/21  
 Legal Counsel

**MARION County Tax Collector  
Refund #3015 Summary**

Account # 343299      Roll R    Code Area 24010

**Owner**  
MASTEN, STEVEN  
MASTEN, DEBORA  
459 AUGUSTA ST SE  
SALEM OR 97306

**Payee**  
WAFD BANK  
9929 EVERGREEN WAY  
EVERETT WA 98204

**Lender**  
Situs      459 AUGUSTA ST SE SALEM, OR 97306  
Reason    Overpayment

**Refund Details**

Year	Refund Amount	Refund Interest	Refund Total
2020	\$34,147.99	\$0.00	\$34,147.99
<b>Total</b>	<b>\$34,147.99</b>	<b>\$0.00</b>	<b>\$34,147.99</b>

**Tax History**

Year	Tax Type	Total Due	Current Due	Original Due	Due Date
2020	ADVALOREM	(\$34,147.99)	(\$34,147.99)	\$12,240.30	15-Nov-2020

Balance As Of 12/31/2020      (\$34,147.99)

**Tax Adjustments**

Year	Discount	Adv Interest	Tax Credit
2020	\$0.00	\$0.00	\$34,147.99

**Payment History**

R #	Year	Date	Payer	Amount
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**Comments** WAFD PD ON WRONG ACCT. XFER TO THIS ACCT, REFUND DIFFERENCE OF #34,147.99. \*\*NEEDS BOC\*\*



12/23/2020

To: Marion County Tax Collection Dept

RE: Incorrect parcel payment

Hello,

*XFER FROM 323299*

We would like to request that our incorrect payment of \$46,021.08 to parcel 323299 be applied to the correct parcel 343299 (459 Augusta St SE, Salem) and the overage be returned to WaFd Bank to be applied back to the homeowner's escrow account.

Please see enclosed signed Refund Petition Form.

Jill Biddle

*Loan Servicing Supervisor*

*Taxes*

9929 Evergreen Way

Everett WA 98204

Office: (206) 264-6964 Option 3

Direct: (425) 609-1618



Account Number: **323299**

**MARION COUNTY TAX COLLECTION DEPARTMENT  
PO BOX 2511**

SALEM, OR 97308-2511  
PHONE 503-588-5215 FAX 503-566-3911 E-mail: Propertytax@co.marion.or.us

REFUND PETITION **RECEIVED**

DEC 29 2020

WAFD BANK  
425 PIKE ST  
SEATTLE WA 98101

MARION COUNTY  
TAX COLLECTOR

Account: 323299  
Prop. Owner: CABINET DOOR SERVICE CO INC  
Prop. Location: 2900 PRINGLE RD SE SALEM, OR 97302  
Map Tax Lot: 083W02BA 00400 A1

Refund due for Duplicate Payment on 2020 property taxes (ORS 311.806).

Amount of overage: \$46,021.08

Date of petition: 12/7/2020

**INSTRUCTIONS:**

Please sign this petition and return it to the Marion County Tax Collection Department at the address above as quickly as possible so that the refund can be processed for you.

Signed: **X** *Jul Bettels* Date: 12/27/2020

**FOR MARION COUNTY USE ONLY:**

Petition verified by: \_\_\_\_\_, Marion County Tax Dept.

The Marion County Board of Commissioners has delegated to the Tax Collector the authority to pay certain property tax refunds (Order 06-21 dated 02/06/06). Some refunds still require specific approval by the Board of Commissioners.

**\*\*PROP OWNER SAID HE DOESN'T HAVE ANY ACCTS WITH YOUR BANK. IF THE PAYMENT WAS MEANT FOR ANOTHER ACCOUNT, PLEASE INFORM US, IN WRITING, AND WE CAN TRANSFER THE PAYMENT\*\***

RFP