

**FORSYTH COUNTY  
BOARD OF COMMISSIONERS**

**BRIEFING  
DRAFT**

**28**

MEETING DATE: JUNE 21, 2018 AGENDA ITEM NUMBER: \_\_\_\_\_

**SUBJECT: RESOLUTION APPROVING REFUNDS BY THE TAX ASSESSOR/COLLECTOR IN THE AMOUNT OF \$321,772.85**

**COUNTY MANAGER'S RECOMMENDATION OR COMMENTS:**

**SUMMARY OF INFORMATION:**

In accordance with the provisions of N.C.G.S. 105-381, the Tax Assessor/Collector has determined that the taxpayers listed on the attached list are eligible for refunds.

ATTACHMENTS:  YES  NO

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_  
COUNTY MANAGER

**RESOLUTION APPROVING REFUNDS BY  
THE TAX ASSESSOR/COLLECTOR**

**WHEREAS**, John Burgiss, Forsyth County Tax Assessor/Collector has certified that the amounts shown on the attached listing of city and county taxes have been levied and assessed illegally or through clerical error; and

**WHEREAS**, the taxpayers have in a timely manner pursuant to law, made demand in writing for a refund of such taxes, and the amounts have been certified by the Tax Assessor/Collector as being in excess of the amounts legally due by the taxpayers in accordance with G.S. 105-381; and

**WHEREAS**, the Tax Assessor/Collector has therefore determined that, as a result of the foregoing, there are overpayments of taxes of \$100.00 or more which should be refunded as shown for the following Fiscal Years:

2017 – 2018	\$321,772.85
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**WHEREAS**, the City of Winston-Salem and other municipalities in Forsyth County have each adopted a Resolution or entered into an interlocal agreement, which authorizes the Forsyth County Board of Commissioners to act on their behalf with regard to refunds, releases and reductions in tax claims.

**NOW, THEREFORE, BE IT RESOLVED** by the Forsyth County Board of Commissioners that the certified County amounts of individual refunds of taxes of \$100.00 or more shown on the attached list of refunds submitted by John Burgiss, Forsyth County Tax Assessor/Collector, are hereby approved and the Forsyth County Chief Financial Officer is directed to make said refunds in the total amount of \$176,451.22, including applicable interest.

**BE IT FURTHER RESOLVED** that the certified amounts of individual refunds of taxes of \$100.00 or more shown on the attached list of refunds submitted by the Tax Assessor/Collector for the City of Winston-Salem and other municipalities in Forsyth County, are hereby approved, and the County Chief Financial Officer is directed to make said refunds in the total amount of \$144,636.75, including applicable interest.

**BE IT FURTHER RESOLVED** that the certified amounts of individual fire tax refunds are hereby approved, and the County Chief Financial Officer is directed to make said refunds in the total amount of \$684.88, including applicable interest.

Adopted this the 21<sup>st</sup> day of June 2018.

OVER \$100

OVER \$100

Name	Address	Address	City	State	ZipCode	Tax Year	Bill Number	Jurisdiction	Subtotal	Veh Fee	Late List	Interest	Refund	Adj Reason	Adj Date
37 RA LLC	145 W MAGNOLIA BLVD		BURBANK	CA	91502	2017	0003130491-2017-2017-0000-00	CLEMMONS	\$944.38	\$0.00	\$0.00	\$40.14	\$984.52	Value Change	3/6/2018
37 RA LLC	145 W MAGNOLIA BLVD		BURBANK	CA	91502	2017	0003130491-2017-2017-0000-00	FORSYTH	\$5,941.38	\$0.00	\$0.00	\$252.51	\$6,193.89	Value Change	3/6/2018
ACV SKYLINE RADD8 LLC	465 1ST W ST	FL 2ND	SONOMA	CA	95476-6600	2017	0001336609-2017-2017-0000-00	FORSYTH	\$876.88	\$0.00	\$0.00	\$37.27	\$914.15	Value Change	3/6/2018
AGI ACQUISITIONS LLC	222 ROBERT ROSE DR		MURFREESBORO	TN	37129	2017	0001262406-2017-2017-0000-00	FORSYTH	\$20,292.73	\$0.00	\$0.00	\$862.44	\$21,155.17	Value Change	3/6/2018
AGI ACQUISITIONS LLC	222 ROBERT ROSE DR		MURFREESBORO	TN	37129	2017	0001262408-2017-2017-0000-00	FORSYTH	\$17,501.47	\$0.00	\$0.00	\$743.81	\$18,245.28	Value Change	3/6/2018
CATERPILLAR INC	100 NE ADAMS ST		PEORIA	IL	61629-0002	2017	0003307751-2017-2017-0000-00	FORSYTH	\$76,787.23	\$0.00	\$0.00	\$3,263.46	\$80,050.69	Value Change	3/6/2018
CLUB HAVEN INVESTMENT CO LLC	PO BOX 20847		GREENSBORO	NC	27420-0847	2017	0003241402-2017-2017-0000-00	FORSYTH	\$8,849.13	\$0.00	\$0.00	\$376.09	\$9,225.22	Value Change	3/6/2018
HV WINSTON-SALEM II LLC	5 CONCOURSE PKWY	STE 2828	ATLANTA	GA	30328	2017	0001266494-2017-2017-0000-00	FORSYTH	\$18,952.08	\$0.00	\$0.00	\$805.46	\$19,757.54	Value Change	3/6/2018
HV WINSTON-SALEM II LLC	5 CONCOURSE PKWY	STE 2828	ATLANTA	GA	30328	2017	0001341316-2017-2017-0000-00	FORSYTH	\$10,750.49	\$0.00	\$0.00	\$456.90	\$11,207.39	Value Change	3/6/2018
SEARS 1997 FAMILY LTD PRTNSH	PO BOX 3165		HARRISBURG	PA	17105-3165	2017	0001268908-2017-2017-0000-00	FORSYTH	\$4,596.34	\$0.00	\$0.00	\$192.79	\$4,729.13	Value Change	3/6/2018
VENTAS SILAS CREEK LP	5450 E HIGH ST	STE 220	PHOENIX	AZ	85054-5477	2017	0001271149-2017-2017-0000-00	FORSYTH	\$3,208.72	\$0.00	\$0.00	\$136.37	\$3,345.09	Value Change	3/6/2018
WITT STREET PROPERTIES LLC	617 MORRIS AVE		BRYN MAWR	PA	19010	2017	0001260163-2017-2017-0000-00	FORSYTH	\$1,561.31	\$0.00	\$0.00	\$66.36	\$1,627.67	Value Change	3/6/2018
37 RA LLC	145 W MAGNOLIA BLVD		BURBANK	CA	91502	2017	0003130491-2017-2017-0000-00	LEWISVILLE FIRE DIST	\$656.96	\$0.00	\$0.00	\$27.92	\$684.88	Value Change	3/6/2018
ACV SKYLINE RADD8 LLC	465 1ST W ST	FL 2ND	SONOMA	CA	95476-6600	2017	0001336609-2017-2017-0000-00	WALKERTOWN	\$242.40	\$0.00	\$0.00	\$10.30	\$252.70	Value Change	3/6/2018
AGI ACQUISITIONS LLC	222 ROBERT ROSE DR		MURFREESBORO	TN	37129	2017	0001262406-2017-2017-0000-00	WINSTON-SALEM	\$16,755.87	\$0.00	\$0.00	\$712.12	\$17,467.99	Value Change	3/6/2018
AGI ACQUISITIONS LLC	222 ROBERT ROSE DR		MURFREESBORO	TN	37129	2017	0001262408-2017-2017-0000-00	WINSTON-SALEM	\$14,451.10	\$0.00	\$0.00	\$614.17	\$15,065.27	Value Change	3/6/2018
CATERPILLAR INC	100 NE ADAMS ST		PEORIA	IL	61629-0002	2017	0003307751-2017-2017-0000-00	WINSTON-SALEM	\$63,403.85	\$0.00	\$0.00	\$2,694.66	\$66,098.51	Value Change	3/6/2018
CLUB HAVEN INVESTMENT CO LLC	PO BOX 20847		GREENSBORO	NC	27420-0847	2017	0003241402-2017-2017-0000-00	WINSTON-SALEM	\$7,306.80	\$0.00	\$0.00	\$310.54	\$7,617.34	Value Change	3/6/2018
HV WINSTON-SALEM II LLC	5 CONCOURSE PKWY	STE 2828	ATLANTA	GA	30328	2017	0001266494-2017-2017-0000-00	WINSTON-SALEM	\$15,648.89	\$0.00	\$0.00	\$665.08	\$16,313.97	Value Change	3/6/2018
HV WINSTON-SALEM II LLC	5 CONCOURSE PKWY	STE 2828	ATLANTA	GA	30328	2017	0001341316-2017-2017-0000-00	WINSTON-SALEM	\$8,876.77	\$0.00	\$0.00	\$377.26	\$9,254.03	Value Change	3/6/2018
VENTAS SILAS CREEK LP	5450 E HIGH ST	STE 220	PHOENIX	AZ	85054-5477	2017	0001271149-2017-2017-0000-00	WINSTON-SALEM	\$2,649.47	\$0.00	\$0.00	\$112.60	\$2,762.07	Value Change	3/6/2018
WITT STREET PROPERTIES LLC	617 MORRIS AVE		BRYN MAWR	PA	19010	2017	0001260163-2017-2017-0000-00	WINSTON-SALEM	\$1,289.19	\$0.00	\$0.00	\$54.79	\$1,343.98	Value Change	3/6/2018
SEARS 1997 FAMILY LTD PRTNSH	PO BOX 3165		HARRISBURG	PA	17105-3165	2017	0001268908-2017-2017-0000-00	KERNERSVILLE	\$3,476.71	\$0.00	\$0.00	\$147.76	\$3,624.47	Value Change	3/6/2018
HV WINSTON-SALEM II LLC	5 CONCOURSE PKWY	STE 2828	ATLANTA	GA	30328	2017	0001266494-2017-2017-0000-00	DOWNTOWN WS BUS DIST	\$2,357.55	\$0.00	\$0.00	\$100.20	\$2,457.75	Value Change	3/6/2018
HV WINSTON-SALEM II LLC	5 CONCOURSE PKWY	STE 2828	ATLANTA	GA	30328	2017	0001341316-2017-2017-0000-00	DOWNTOWN WS BUS DIST	\$1,337.31	\$0.00	\$0.00	\$56.84	\$1,394.15	Value Change	3/6/2018
									\$3,694.86	\$0.00	\$0.00	\$157.04	\$3,851.90		
									<b>\$308,655.01</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$13,117.84</b>	<b>\$321,772.85</b>		

2017 **\$321,772.85**

Forsyth	\$169,257.76
Forsyth Interest	\$7,193.46
Winston	\$134,076.80
Winston Interest	\$5,698.26
Clemmons	\$944.38
Clemmons Interest	\$40.14
Walkertown	\$242.40
Walkertown Interest	\$10.30
Kernersville	\$3,476.71
Kernersville Interest	\$147.76
Fire District	\$656.96
Fire District Interest	\$27.92
	<b>\$321,772.85</b>

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## M E M O R A N D U M

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**DATE:** JUNE 1, 2018  
**TO:** Dudley Watts  
County Manager  
**FROM:** John T. Burgiss  
Tax Assessor/Collector  
**RE:** Tax Refunds

In accordance with procedures established with the Commissioners, the attached list of taxpayers are due refunds of County taxes totaling \$176,451.22, including applicable interest, and refunds of municipal taxes totaling \$144,636.75, including applicable interest. Individual fire tax refunds requiring approval total \$684.88. The taxpayer's name is shown along with the reason for the refund and the amount. I am available to answer any questions you may have.

I, John Burgiss, Forsyth County Tax Assessor/Collector, do hereby certify that the attached list of taxes were required to be paid, and have been collected, through clerical error or by a tax illegally levied and assessed. The taxpayers have made demand in writing for the refund of such taxes paid, and the amounts shown on this list are in excess of the amounts legally due by the taxpayers and should be refunded for the reasons hereinafter set forth in accordance with G.S. 105-381.

  
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John Burgiss, RES  
Assessor/Collector

JTB/tcl