

RESOLUTION 2015 - 100

A RESOLUTION ORDERING A REFUND OF TAXES/FEES/ASSESSMENTS PAID

WHEREAS, Lori Frisbey was assessed for property under assessor code 11342;
and

WHEREAS, Lori Frisbey has qualified for the Property Tax Assistance program;
and

WHEREAS, the Department of Revenue has provided evidence regarding the
change in assessment; and

WHEREAS, the error occurred for tax year 2014; and

WHEREAS, a hearing was held on July 21, 2015;

NOW THEREFORE, the Lewis and Clark County Commissioners make the
following conclusions of law:

1. Lori Frisbey has paid the taxes/fees/assessments.
2. Lori Frisbey has proven a refund is due to her.
3. The claims for refund were filed within five years of the collection.

IT IS HEREBY RESOLVED that, in accordance with Section 15-16-603, MCA,
the Lewis and Clark County Commissioners refund an amount of \$451.10 to Lori
Frisbey, % Corelogic Tax Services Refunds Dept, PO Box 91250, Fort Worth, TX
76161.

Dated this 21 day of July, 2015.

3275854 B: M50 P: 1283 COUNTY
07/21/2015 11:39 AM Pages: 1 of 9 Fees: 0.00
Paulette DeHart Clerk & Recorder, Lewis & Clark MT



LEWIS AND CLARK COUNTY
BOARD OF COMMISSIONERS

Andy Hunthausen
Andy Hunthausen, Chairman



ATTEST:

Paulette DeHart

Paulette DeHart, Clerk of the Board

NOTE: Taxpayer ID Number/Social Security Number is required by IRS Code 6041(a) and
Treas. Reg. Section 1.6041-1(a). Without this taxpayer information, a property tax refund
cannot be issued.

Cheryl Green, Supervisor
Delinquent Tax Collector
1-406-447-8362



City-County Building
316 North Park Ave. Rm 113
Helena, MT 59623

LEWIS AND CLARK COUNTY

Consolidated Office of Treasurer/Clerk and Recorder

February 11, 2015

Lewis & Clark County Commission
316 N Park
Helena MT 59623

Refund Request: Lori Frisbey
% Corelogic Tax Services
Refunds Dept.
Box 91250
Fort Worth, TX 76161

Assessor Code: 11342

Dear Board of County Commissioners:

Pursuant to 15-16-603, MCA, the taxpayer has requested a tax refund for tax year 2014. DOR showed the taxpayer is eligible for PTAP.

Tax Year 2014	Taxes	\$425.60
	2518Open Space	1.16
	8013 Soil & Water	3.79
	2121 Forestvale Cemetery	2.29
	3002 West Valley Fire	13.83
	8003 Mosquito	4.43

2014 Refund: \$451.10

Thanking you in advance, I am


Cheryl Green

Supervisor/Delinquent Tax Collector



Lewis and Clark County Board of Commissioners
316 N. Park Avenue
Helena, MT 59623

Re: Tax Refund
Geo Code: 11342

Dear Commissioners:

Consider this my request for a tax refund for the above-referenced property. As a part of this request I am providing you the following information.

Name and address of the legal owner:

Lois Fusby Corlogic Tax Service
Attn: Refund Department
P.O. Box 961250
Worth, TX 76161-0250

Legal Description of the property (or other property description):

Helena Valley Estates Lot 40

Amount of refund and year for which the refund is requested:

Year(s) 2014
Amount \$451.10

Reason for the refund request:

eligible for PTAP

Were taxes paid under protest: Yes No
If not, what is the reason they were not paid under protest?

Attached is other information for your consideration: Yes No

Thank you for your consideration.

Sincerely,

Clarell Watkins - Agent
Signature of Taxpayer

7-8-15
Date



To: LEWIS & CLARK COUNTY (#250250000) -EW
Re: Enclosed Refund Application
Reference Voucher #: 1350755
Refund Amount: \$451.10

Notification has been thoroughly researched, and it has been determined that CoreLogic paid correctly on the account/parcel and our payment should stand. Please consider this as a formal request to refund the duplicate payment to the party that made the other payment.

Notification has been thoroughly researched and it has been determined that this refund should be issued to CoreLogic. Please consider this as a formal request to refund the duplicate/overpayment to: CoreLogic c/o Lender.

Notification has been thoroughly researched and it has been determined that Corelogic does not have interest in this refund since the loan was not serviced by Corelogic at the time of payment. Please consider this as a formal request to refund the duplicate/overpayment directly to the homeowner ---- at time of payment.

CoreLogic Tax Service
Attn: Refunds Department
P.O. Box 961250
Ft Worth, TX 76161-0250

In addition, in order to help us correctly identify the account/parcel(s) being refunded, please include a copy of the refund application with the refund check.

Should you have any questions or need additional assistance, please feel free to call us at 817-699-2601 or email any Refund Inquiries to: DFW01.Refunds@corelogic.com

Date: 02/10/2015
Time: 07:54:11

LEWIS AND CLARK COUNTY, TREASURER

Oper: cgreen

Tax Year: 2014 Tax Code : 11342

6231

VALUATION / ASSESSMENT

Legal#	Class Code	Class	Type	Description	Qty	Market Value	Taxable Value
2132	1	2101	4	RV	1.38	30,335	749.49
3137	1	330T	4	IM	0.00	61,673	1,523.302
						92,008	2,272.451

PAYOFF INFORMATION (AS OF: 02/10/2015)

Tax Year	Stmt#	Pmt Half	1st Half Amount	1st Half Status	2nd Half Amount	2nd Half Status	Penalty/Interest	TOTAL DUE
2014	5871		0.00		809.83	Current	0.00	809.83
								809.83

BILLING HISTORY (SELECTED TAX YEAR: 2014)

Tax Year	Stmt#	Spec Dist	Levy Dist	Sub	Description	1st HALF			2nd HALF			
						Billed	Stat	Due Date	Billed	Stat	Due Date	
2014	5871	0000	10	03	Tax District 10	280.21	705.81	PD	11/26/2014	705.81	DUE	05/31/2015
2014	5871	2121	10	03	FORESTVALE CEM	1.51	3.80	PD	11/26/2014	3.79	DUE	05/31/2015
2014	5871	2518	10	03	OPEN-SPACE LANDS	1.77	1.93	PD	11/26/2014	1.93	DUE	05/31/2015
2014	5871	3002	10	03	WEST VALLEY FIRE	9.10	22.93	PD	11/26/2014	22.92	DUE	05/31/2015
2014	5871	8003	10	03	SCRATCH GRAVEL		48.00	PD	11/26/2014	48.00	DUE	05/31/2015
2014	5871	8004	10	03	HLN VLY IRG		15.39	PD	11/26/2014	15.38	DUE	05/31/2015
2014	5871	8006	10	03	MOSQUITO	2.92	7.35	PD	11/26/2014	7.35	DUE	05/31/2015
2014	5871	8012	10	03	WATER QLTY OUTSIDE CITY		4.66	PD	11/26/2014	4.65	DUE	05/31/2015
2014	5871	8013	10	03	SOIL & WATER	.94	4.73	PD	11/26/2014	0.00		
TOTAL:						814.60				809.83		20.03

Sen tax refund

FC	425.60
OS	2.29
WV	1.16
mosq	13.83
SW	4.43
	3.79
	<u>\$ 451.10</u>

D 05-1995-29-2-04-04-0000 Real Property
R0514242
HELENA VALLEY ESTATES S29 T11 N R03 W L04 4d

Owner: WAMONTLOR LIORZITZKI
Site: 1315 PONDEROSA RD, HELENA, MT 59602

Tax Year: 2014
As of: 01/31/2015

Calculated Values
As of: 01/31/2015

Assessment Values Selection Detail

Assessment Values Totals Page

Class	Totals	2101	2132	3137	3301
1 Class	57,236	57,236	0	0	0
2 Reappraisal Land Value	116,364	0	0	0	116,364
3 Reappraisal Building Value	173,600	57,236	0	0	116,364
4 Total Reappraisal Value	234,398	26,791	26,791	90,408	90,408
5 Value Before Reappraisal	173,600	57,236	0	0	116,364
6 Phase In Value	81,592	26,901	0	0	54,691
7 Exempt Value (Home/Comstead)	92,008				61,673
8 Taxable Market Value	N/A				4
9 Tax Class	N/A				4
10 Taxable Percent	2,272	2,47	0,49	0,49	2,47
11 Taxable Value	1,380	749	0	0	1,523
12 Acres	0	1,380	0,000	0,000	0,000
13 TIF Base Value	0	0	0	0	0
14 TIF Incremental Value	0	0	0	0	0
15 Proration Factor (for testing)	0,000	0,000	0,000	0,000	0,000
16 Total Mills	N/A	651,300	651,300	651,300	651,300
17 Tax Amount (Ad Valorem)	1,479,75	487,82	0,00	0,00	991,93
18 HOMESTEAD CAP INFORMATION	N/A				
19 Res Value Under Cap Incl OBY	\$116,364	\$0	\$0	\$0	\$116,364
20 Residential Value Over Cap	\$0	\$0	\$0	\$0	\$0

Exclude from Notice Extract - This property will be excluded from the notice extract.

Total Lines: 23

BEFORE PTAP WORK UP - ASSESSMENT CODE# 11342

4801 Frederica Street
P.O. Box 20005
Owensboro, KY 42304

REAL ESTATE TAX EXEMPTION FORM

HOMEOWNER NAME: Lois L. Furbey (Vander)
PARCEL NUMBER: 11342
PROPERTY ADDRESS: 1375 Ponderosa Rd
LOAN NUMBER: 10850188234

The above parcel will be authorized a (exemption type)
Property tax reduction exemption for the tax year
2014.

Based on the present value, the current millage rate, and the current exemption status, The 2014 (year) taxes on this property are estimated to be \$ 889.90 (approximate amount), which includes any no-ad valorem assessments which might include garbage, solid waste, street lighting, stormwater, etc.

PREPARED BY: Cheyl Green Supervisor

DATE: 2/9/15





Service Providers, LLC

All of us serving you®

4801 Frederica St
P. O. Box 20005
Owensboro, KY 42304

January 28, 2015

Lori L Vanaken
1375 Ponderosa Road
Helena MT 59602

RE: Property Address: 1375 Ponderosa Road
Helena MT 59602

Dear Mortgagor(s):

U.S. Bank Home Mortgage has received your request to adjust your mortgage payment to reflect your real estate tax exemption.

In order for U.S. Bank to make this adjustment, we require the estimated dollar amount of your taxes. Please have the attached form completed by the property assessor and return to us. Without this information, we will not be able to adjust your payment.

Once we receive this information, your escrow account will be adjusted to reflect the estimated tax amount. Please be advised; estimated tax amounts are subject to change based on the tax rate and/or assessment changes as established by the property assessor, which may result in a escrow shortage/overage when taxes are paid.

If you have any questions concerning this matter, please contact our Customer Service Center at 800-365-7772 or visit our website at www.usbankhomemortgage.com.

Sincerely,

SHANA MCBRIDE
MORTGAGE TAX SPECIALIST
U.S. BANCORP SERVICE PROVIDERS

TX206/TGZ/6850188234