Sonoma County Claim for Excess Proceeds

I hereby certify that I am a party of interest in the following real property:

Parcel Number: ____________________ Assessee: ____________________

Property Situs: ____________________

Date of Tax Sale: ____________________ Date Tax Deed Recorded: ____________________

I UNDERSTAND THAT THE FINAL DATE TO SUBMIT A CLAIM IS ____________________ AND CLAIMS NOT RECEIVED BY THE TAX COLLECTOR BY THAT DATE WILL NOT BE ACCEPTED.

I claim excess proceeds under Revenue and Taxation Code §4675 based upon my interest in the above-described property as a:

- ☐ Lienholder of Record
- ☐ Owner of Record
- ☐ Qualified Heir(s) of Owner of Record
- ☐ Assignee of a Party of Interest (Please also submit the completed Affidavit of Assignment Form)

I claim $__________ or __________ % of available excess proceeds. Documentation proving my right to excess proceeds is enclosed.

I affirm under penalty of perjury that the foregoing and all enclosures are true and correct to the best of my knowledge.

Signature of Claimant: ____________________ Date: ____________________

Printed Name of Claimant: ____________________

Daytime Phone: ____________________ Email: ____________________

Mailing Address: ____________________

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

State of California

County of ____________________

Subscribed and sworn to (or affirmed) before me on this __________ day of __________ , 20 ________ , by ____________________ , proved to me on the basis of satisfactory evidence to be the person(s) who appeared before me.

(Notary Seal)

____
Signature of Notary Public

RESET FORM

Instructions For Filing a Claim

Please refer to the Sonoma County Policy regarding Submission of Claims for Excess Proceeds for important information regarding submission of claims. A copy of the policy can be found here: https://sonomacounty.gov/acttc/tax-defaulted-property-auctions

California Revenue and Taxation Code Section 4675, states in part that parties of interest and their order of priority are:

a) First, lien holders of record prior to the recordation of the tax deed to the purchaser, in the order of their priority.
b) Then, any person with title of record to all or any portion of the property prior to the recordation of the tax deed to the purchaser.

If you believe you qualify as a party of interest in the sale of tax-defaulted property, please fill out the form stating how you have determined your status as a party of interest and provide the supporting documentation as required by the Sonoma County Policy regarding Submission of Claims for Excess Proceeds.

A party of interest in the property at the time of the sale may assign his or her right to claim the excess proceeds only by a dated, written instrument that explicitly states that the right to claim the excess proceeds is being assigned, and only after each party to the proposed assignment has disclosed to each other party to the proposed assignment all facts of which he or she is aware relating to the value of the right that is being assigned. If filing as an Assignee of a Party of Interest, please also submit the completed Affidavit of Assignment Form.

If you are filing a claim for excess proceeds on behalf of, or in place of, any party of interest, you must submit proof with the claim that the amount and source of excess proceeds have been disclosed to the party of interest and that the party of interest has been advised of their right to file a claim for the excess proceeds on their own behalf directly with the county at no cost.

Claims will be processed after one year has passed from the date of the recording of the deed to the purchaser. To receive consideration, claims must be received **BEFORE THE EXPIRATION OF ONE YEAR** following the date of the recording of the deed to the purchaser. Please see the **FINAL DATE TO SUBMIT CLAIMS** appearing on the enclosed notice or this can be provided by contacting the Tax Collector's office.

Following County review, the claim will either be approved or denied. The County will notify you of the action taken. Should the claim be approved, the Auditor-Controller will, after 90 days, issue a county warrant in payment.

Mail completed forms to:

Sonoma County Auditor-Controller Treasurer-Tax Collector
RE: CLAIM FOR EXCESS PROCEEDS
585 Fiscal Drive, Suite 100
Santa Rosa, CA 95403

If you have questions or need additional information regarding the excess proceeds claim form, please contact the Tax Collector's office at Taxcollector@sonomacounty.gov or 707-565-2281.