

Tax Committee Meeting: 09/17/2020

Board of Commissioners Meeting: 10/05/2020

TO: Wake County Board of Commissioners and Town Board of Apex

FOR: Consideration of Requests for Adjustments, Rebates, and/or Refunds of Penalties

Approved by: Kim Lorbacher

The Wake County Tax Committee has approved the following policy to recommend relief of the late listing and/or vehicle penalties when at least one of the following conditions apply:

Relief Codes:

- 1. New to North Carolina
- 2. First time listing
- 3. Previous year listing on time
- 4. Omitted item(s) from listing - Current/previous listing on time
- 5. Military Deployment
- 6. Provided proof of timely listing

Item #	Taxpayer(s)	Description Jurisdiction	Account # / Year For Payment Status	Late List Appealed	Appeal/Request Type	Recommendation	Relief Code
16865	COSTCO WHOLESALE CORPORATION PROPERTY TAX DEPT 999 LAKE DR ISSAQUAH WA 98027-8990	BUSINESS PERSONAL PROPERTY APEX	0006804622 2020 Not Paid	\$3,668.76	Late List Penalty	Granted	6
16845	LETOURNEAU ENTERPRISES LLC 11325 NORTH COMMUNITY HOUSE RD. SUITE 125 CHARLOTTE, NC 28277	BUSINESS PERSONAL PROPERTY APEX	0006910716 2020 Not Paid	\$368.89	Late List Penalty	Relief	

This List Requires Board Action

Tax Committee Members: Natasha Baldwin, City Of Raleigh
Kim Lorbacher, Wake County Finance
Jessica Murphy-Rhem, Town Of Cary

MKD

Marcus Kinrade, Tax Administrator

Board Report

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Date : 10/05/2020

Approved By : Kinrade

TO : WAKE COUNTY BOARD OF COMMISSIONERS

RE: CONSIDERATION OF REFUND FOR TAXES, INTEREST AND PENALTIES FOR APEX

No.	Name of Tax Payer	Account Number	Tax and Penalties	Total Rebate	Total Refund	Request Status
1	BELLA CASA HOMEOWNERS ASSOCIATION INC 160 NE MAYNARD RD STE 210 CARY NC, 27513 - 9676	0000149490- 2018- 2018- 000000	City 1,321.19 County 2,083.35	3,404.54	3,404.54	Refund
2	BELLA CASA HOMEOWNERS ASSOCIATION INC 160 NE MAYNARD RD STE 210 CARY NC, 27513	0000149490- 2019- 2019- 000000	City 1,321.19 County 2,294.42	3,615.61	3,615.61	Refund
3	BELLA CASA HOMEOWNERS ASSOCIATION INC 160 NE MAYNARD RD STE 210 CARY NC, 27513	0000434299- 2017- 2017- 000000	City 1,097.05 County 1,775.49	2,872.54	2,872.54	Refund
4	GEETHA, SATHYA ANNAMALAI RATHINAVEL, SANGEETHA 142 ANNABELLE BRANCH LN APEX NC, 27523 - 5825	0000458948- 2020- 2020- 000000	City 277.66 County 438.41	716.07	716.07	Refund
Marcus D. Kinrade			Total City Rebated	4,017.09		
Wake County Tax Administrator			Total County Rebated	6,591.67		
			Total Rebate/Refund	10,608.76	10,608.76	

M.D.K.

CC:

*Refund amount may differ from rebated total due to released interest or application of payment to any balance due on the account.

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Rebate Details

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REBATE NUMBER	PROPERTY	CITY TAG	LATE LIST	BILLED INTEREST	TOTAL REBATED	PROCESS DATE	ACCOUNT NUMBER	TAX YEAR	YEAR FOR	BILLING TYPE	OWNER
BUSINESS REAL ESTATE ACCOUNTS											
762929	34.11	0.00	0.00	0.00	34.11	08/19/2020	0000070429	2020	2020	000000	ORCHID HOMES LLC
762946	2,602.62	0.00	0.00	0.00	2,602.62	08/19/2020	0000060308	2020	2020	000000	DRP NC 4 LLC
763778	330.60	0.00	0.00	0.00	330.60	08/26/2020	0000427777	2020	2020	000000	TRACE II HOMEOWNERS ASSOCIATION INC
764249	1,321.19	0.00	0.00	0.00	1,321.19	08/31/2020	0000149490	2019	2019	000000	BELLA CASA HOMEOWNERS ASSOCIATION INC
764248	1,321.19	0.00	0.00	0.00	1,321.19	08/31/2020	0000149490	2018	2018	000000	BELLA CASA HOMEOWNERS ASSOCIATION INC
762356	10,335.15	0.00	0.00	0.00	10,335.15	08/17/2020	0000444378	2020	2020	000000	PEAKWAY CAPITAL LLC
764110	85.78	0.00	0.00	0.00	85.78	08/28/2020	0000440649	2020	2020	000000	CORP OF THE PRESIDING BISHOP OF THE CHUR
763628	200.46	0.00	0.00	0.00	200.46	08/25/2020	0000218833	2020	2020	000000	IM, PAUL Y
764255	1,096.47	0.00	0.00	0.00	1,096.47	08/28/2020	0000039374	2020	2020	000000	SALISBURY PARTNERS, LLC

SUBTOTALS FOR BUSINESS REAL ESTATE ACCOUNTS	17,327.57	0.00	0.00	0.00	17,327.57	9	Properties Rebated				
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INDIVIDUAL PROPERTY ACCOUNTS

762720	70.30	0.00	7.03	0.00	77.33	08/17/2020	0006908938	2020	2020	000000	BREWER, JEREMY JOE
763765	563.09	120.00	0.00	0.00	683.09	08/26/2020	0006795036	2020	2020	000000	PENSKE TRUCK LEASING LP
761619	178.61	0.00	17.86	0.00	196.47	08/03/2020	0006897876	2020	2020	000000	SCHOENAGEL, ERIC MARK
762617	151.97	25.00	0.00	0.00	176.97	08/17/2020	0006916101	2020	2019	000000	BELLARD, MARISSA ROSE MAGEE
763295	126.10	25.00	0.00	0.00	151.10	08/20/2020	0006895275	2020	2019	000000	TIGHE, STACY LYNN



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SUBTOTALS FOR INDIVIDUAL PROPERTY ACCOUNTS												
	1,090.07	170.00	24.89	0.00	1,284.96	5	Properties Rebated					
INDIVIDUAL REAL ESTATE ACCOUNTS												
764379	796.16	0.00	0.00	0.00	796.16	08/31/2020	0000246565	2020	2020	000000	SILHANEK, VIRGINIA	
764384	369.21	0.00	0.00	0.00	369.21	08/31/2020	0000451546	2020	2020	000000	BOECK, DALE ROBERT	
764385	187.30	0.00	0.00	0.00	187.30	08/31/2020	0000242962	2020	2020	000000	SKINNER, REGINALD T	
764394	235.81	0.00	0.00	0.00	235.81	08/31/2020	0000439023	2020	2020	000000	MEHTA, ANKIT	
764395	215.29	0.00	0.00	0.00	215.29	08/31/2020	0000439036	2020	2020	000000	GILL, JOSHUA DANIEL	
764398	30.12	0.00	0.00	0.00	30.12	08/31/2020	0000438497	2020	2020	000000	PILLAI, MAHESH B	
762921	171.00	0.00	0.00	0.00	171.00	08/18/2020	0000465358	2020	2020	000000	OLEVANO, ANDREA	
762948	1,129.08	0.00	0.00	0.00	1,129.08	08/19/2020	0000060249	2020	2020	000000	DRP NC 4 LLC	
763057	63.89	0.00	0.00	0.00	63.89	08/19/2020	0000091902	2020	2020	000000	BARKES, SCOTT EDWARD	
763078	239.72	0.00	0.00	0.00	239.72	08/19/2020	0000119983	2020	2020	000000	TELKE, CRAIG S	
763113	558.02	0.00	0.00	0.00	558.02	08/19/2020	0000232458	2020	2020	000000	ZHECHEVA, NIKOLINKA ANTONOVA	
763123	104.38	0.00	0.00	0.00	104.38	08/19/2020	0000153873	2020	2020	000000	BURGESS, PETER A	
763231	57.05	0.00	0.00	0.00	57.05	08/20/2020	0000232892	2020	2020	000000	OVERTON, RODNEY ALLEN	
763234	123.83	0.00	0.00	0.00	123.83	08/20/2020	0000287838	2020	2020	000000	BORGMEYER, NATHAN	
763255	95.42	0.00	0.00	0.00	95.42	08/20/2020	0000272932	2020	2020	000000	BARKER, TOMMY	
763304	82.88	0.00	0.00	0.00	82.88	08/21/2020	0000194948	2020	2020	000000	BULEBUSH, JOSEPH C	
763419	682.62	0.00	0.00	0.00	682.62	08/21/2020	0000448352	2020	2020	000000	MORI, NAGAKO	
763431	171.00	0.00	0.00	0.00	171.00	08/21/2020	0000444631	2020	2020	000000	HARRIS, KEITH	
763432	520.27	0.00	0.00	0.00	520.27	08/21/2020	0000052237	2020	2020	000000	OQUINN, NICKIE S	
763562	250.80	0.00	0.00	0.00	250.80	08/24/2020	0000451471	2020	2020	000000	GILES, RYAN PETER	
763563	122.73	0.00	0.00	0.00	122.73	08/24/2020	0000466521	2020	2020	000000	FENG, JINCHUN	
763608	366.17	0.00	0.00	0.00	366.17	08/25/2020	0000217128	2020	2020	000000	TRAINOR, EMILY ANN	



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INDIVIDUAL REAL ESTATE ACCOUNTS											
763609	313.16	0.00	0.00	0.00	313.16	08/25/2020	0000218109	2020	2020	000000	NASEEM, NAGEH
763611	339.73	0.00	0.00	0.00	339.73	08/25/2020	0000218108	2020	2020	000000	MORGAN, JASON LLOYD
763612	306.26	0.00	0.00	0.00	306.26	08/25/2020	0000218106	2020	2020	000000	GILBERT, JACQUES K
763615	312.90	0.00	0.00	0.00	312.90	08/25/2020	0000218105	2020	2020	000000	CULL, KRISTA M
763616	292.06	0.00	0.00	0.00	292.06	08/25/2020	0000218104	2020	2020	000000	RAVAL, DEEPA J
763617	310.25	0.00	0.00	0.00	310.25	08/25/2020	0000218851	2020	2020	000000	ACKERMAN, MARK A
763622	254.47	0.00	0.00	0.00	254.47	08/25/2020	0000218847	2020	2020	000000	BEDNARZ, STANLEY M
763623	328.82	0.00	0.00	0.00	328.82	08/25/2020	0000218842	2020	2020	000000	FJELSTAD, DENNIS E
763624	395.28	0.00	0.00	0.00	395.28	08/25/2020	0000218830	2020	2020	000000	SULEIMAN, RAMI T
763625	347.61	0.00	0.00	0.00	347.61	08/25/2020	0000218169	2020	2020	000000	CANUPP, EDWARD LEE
763627	282.22	0.00	0.00	0.00	282.22	08/25/2020	0000218173	2020	2020	000000	DEVLIN, ANNMARIE
763629	219.24	0.00	0.00	0.00	219.24	08/25/2020	0000218162	2020	2020	000000	BYRNE, CATHERINE MARY
763630	310.99	0.00	0.00	0.00	310.99	08/25/2020	0000218157	2020	2020	000000	XU, QIUHUA
763631	323.29	0.00	0.00	0.00	323.29	08/25/2020	0000218161	2020	2020	000000	CAIN, DEREK L
763632	307.32	0.00	0.00	0.00	307.32	08/25/2020	0000218120	2020	2020	000000	BAI, RE
763633	292.06	0.00	0.00	0.00	292.06	08/25/2020	0000218856	2020	2020	000000	COOK, DAVID G
763644	47.02	0.00	0.00	0.00	47.02	08/25/2020	0000202666	2020	2020	000000	ZHANG, JUN
763646	93.24	0.00	0.00	0.00	93.24	08/25/2020	0000283382	2020	2020	000000	BENNETT, CHENCHEN HOU
761241	40.40	0.00	0.00	0.00	40.40	08/05/2020	0000028900	2020	2020	000000	SAYLOR, SCOTT MARTIN
761371	150.71	0.00	0.00	0.00	150.71	08/04/2020	0000456670	2020	2020	000000	SANSONE, RANDY A
761378	224.13	0.00	0.00	0.00	224.13	08/04/2020	0000461718	2020	2020	000000	BOWLING, KATSIARYNA
761379	101.69	0.00	0.00	0.00	101.69	08/04/2020	0000464019	2020	2020	000000	LANZA, SANTO MICHAEL
761488	267.02	0.00	0.00	0.00	267.02	08/04/2020	0000456691	2020	2020	000000	BUSH, LEONARD ERIC
761489	68.36	0.00	0.00	0.00	68.36	08/04/2020	0000241466	2020	2020	000000	ESTES, MARY L
763750	33.28	0.00	0.00	0.00	33.28	08/25/2020	0000214910	2020	2020	000000	WENCE, BRYAN SCOTT
763768	345.29	0.00	0.00	0.00	345.29	08/25/2020	0000218170	2020	2020	000000	JOHNSON, TIMOTHY W
763888	4.92	0.00	0.00	0.00	4.92	08/26/2020	0000274458	2020	2020	000000	SLONIM, ALLAN H
763890	248.56	0.00	0.00	0.00	248.56	08/26/2020	0000452595	2020	2020	000000	RUTHALA, RAVI KUMAR



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INDIVIDUAL REAL ESTATE ACCOUNTS											
763891	120.33	0.00	0.00	0.00	120.33	08/26/2020	0000453467	2020	2020	000000	KOZLOWSKI, RICHARD A
763894	158.04	0.00	0.00	0.00	158.04	08/26/2020	0000457887	2020	2020	000000	EAST, WENDY ANN
763906	67.96	0.00	0.00	0.00	67.96	08/26/2020	0000294066	2020	2020	000000	KALIK, MICHAEL
763926	159.65	0.00	0.00	0.00	159.65	08/26/2020	0000289340	2020	2020	000000	LITTLE, ARTHUR D
763937	138.44	0.00	0.00	0.00	138.44	08/27/2020	0000321252	2020	2020	000000	GRIFFIN, MICHAEL T
763938	33.32	0.00	0.00	0.00	33.32	08/27/2020	0000367761	2020	2020	000000	DICKERSON, JORDAN
763945	162.91	0.00	0.00	0.00	162.91	08/27/2020	0000434142	2020	2020	000000	JANAPAREDDY, TARAKESWARA RAO
764043	182.83	0.00	0.00	0.00	182.83	08/28/2020	0000434143	2020	2020	000000	BOKKA, VEERENDAR
764045	106.53	0.00	0.00	0.00	106.53	08/28/2020	0000428622	2020	2020	000000	WILDING, CRYSTAL
764060	52.34	0.00	0.00	0.00	52.34	08/28/2020	0000238411	2020	2020	000000	BOWEN, JAMES C
764061	160.45	0.00	0.00	0.00	160.45	08/28/2020	0000434153	2020	2020	000000	FROST, MARTIN
764072	268.34	0.00	0.00	0.00	268.34	08/28/2020	0000441969	2020	2020	000000	LOWY, MARTIN
764084	109.92	0.00	0.00	0.00	109.92	08/28/2020	0000436601	2020	2020	000000	DAVIS, RHETTA TRUSTEE
764092	191.14	0.00	0.00	0.00	191.14	08/28/2020	0000445774	2020	2020	000000	CHANG, JOHN CHIH-HSIUNG
764104	179.73	0.00	0.00	0.00	179.73	08/28/2020	0000456683	2020	2020	000000	HUNTER, KATHLEEN BARI
764109	492.12	0.00	0.00	0.00	492.12	08/28/2020	0000218154	2020	2020	000000	REYES, JOAQUIN S JR
764226	171.00	0.00	0.00	0.00	171.00	08/28/2020	0000439068	2020	2020	000000	RHOADS, JEFFREY THOMAS
762606	171.00	0.00	0.00	0.00	171.00	08/17/2020	0000120009	2020	2020	000000	GRANT, CORY A
762743	94.25	0.00	0.00	0.00	94.25	08/18/2020	0000036035	2020	2020	000000	HERBST, JAMES E
762761	171.00	0.00	0.00	0.00	171.00	08/18/2020	0000305574	2020	2020	000000	KESSLER, JOAN
764245	277.66	0.00	0.00	0.00	277.66	08/28/2020	0000458948	2020	2020	000000	GEETHA, SATHYA ANNAMALAI
764246	1,097.05	0.00	0.00	0.00	1,097.05	08/28/2020	0000434299	2017	2017	000000	BELLA CASA HOMEOWNERS ASSOCIATION INC
764252	594.84	0.00	0.00	0.00	594.84	08/28/2020	0000052903	2020	2020	000000	STEPHENSON, GREGORY ARTHUR
764360	214.86	0.00	0.00	0.00	214.86	08/31/2020	0000220786	2020	2020	000000	TEW, BETTY R



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SUBTOTALS FOR INDIVIDUAL REAL ESTATE ACCOUNTS	18,508.74	0.00	0.00	0.00	18,508.74		74		Properties Rebated	
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TOTAL REBATED FOR APEX	36,926.38	170.00	24.89	0.00	37,121.27		88		Properties Rebated for City	
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