



## TOWN COUNCIL AGENDA ITEM

**MEETING DATE: May 14, 2024**

Agenda Title/Category:	<b>Tax Refunds / Consent Agenda</b>			
Staff Contact/Presenter:	<b>Christopher Tucker, Finance Director</b>			
Meets Strategic Initiative or Approved Plan:	<b>Yes</b>	<b>No</b>	If yes, list:	<b>N/A</b>
Background:	Throughout the year, taxpayers may appeal their tax bills to the Mecklenburg County Assessor and/or Tax Collector. If the bill has been paid prior to the successful appeal, the County will advise the Town to refund the taxes paid with interest.			
Discussion:				
Fiscal impact:	Ad Valorem Tax Revenue will <b>decrease</b> by \$25,000			
Attachments:	Staff Memo, Refund Guidance from County (x4)			
Recommended Motion to be made by Council:	<b>Approve as Presented</b>			



May 8, 2024

To: Honorable Mayor and Town Council  
Ryan Spitzer, Town Manager  
Lisa Snyder, Town Clerk

From: Christopher Tucker, Finance Director CMT

RE: Council Action Request – Tax Refunds

For Council's consideration at the May 14, 2024 Council Meeting, please find attached the below tax refunds per Mecklenburg County guidance.

2023	P# 22150103	(\$1,038.25)
2023	P# 22119138	(\$3,435.11)
2023	P# 20708101	(\$2,612.59)
2023	P# 22104109	(\$31.35)
2023	P# 22151202	(\$4,022.20)
2023	P# 22138415	(\$39.33)
2023	P# 22101101	(\$211.18)
2023	P# 20519111	(\$740.43)
2023	P# 22119148	(\$500.46)
2023	P# 20501314	(\$444.03)
2023	P# 20509205	(\$1013.46)
2023	P# 20708121	(\$4,236.52)
2023	P# 20507123	(\$838.19)
2023	P# 22119113	(\$5,476.56)

**TOTAL: (\$24,639.66)**

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PINEVILLE Refunds

Tax Year	Bill Number	Parcel #	Source Type	Adj. #	Adj Reason	Date of Adj.	Recipient Name	Address	City	State	Zip Code	Payment Date for Interest Calculation	Refund Amount (\$)	Total Interest to Pay if mailed on or before 5/1/2024 (\$)	Total Interest to Pay if mailed on or before 5/10/2024 (\$)
2023	0002022119-2023-2023-0000-00	22150103	REI	621227	BER Decision	3/11/2024	B M SERVICES LLC	1018 LAKE FOREST DR	WEDDINGTON	NC	28104	1/6/2024	1,038.25	51.91	51.91
2023	0002016297-2023-2023-0000-00	22119138	REI	621334	BER Decision	3/19/2024	JOHNSTON RD PLAZA LLC	PO BOX 36799	CHARLOTTE	NC	28236	1/6/2024	3,024.14	151.21	151.21
2023	0002016327-2023-2023-0000-00	22119158	REI	621335	BER Decision	3/19/2024	JOHNSTON RD PLAZA LLC	PO BOX 36799	CHARLOTTE	NC	28236	1/6/2024	410.97	20.55	20.55
2023	0001970219-2023-2023-0000-00	20708101	REI	621375	BER Decision	3/15/2024	TT OF SOUTH BLVD INC	505 S FLAGLER DR STE 700	WEST PALM BEACH	FL	33401	1/6/2024	2,612.59	130.63	130.63
<b>TOTALS</b>													<b>7,085.95</b>	<b>354.30</b>	<b>354.30</b>

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**PINEVILLE Refunds**

Tax Year	Bill Number	Parcel #	Source Type	Adj. #	Adj. Reason	Date of Adj.	Recipient Name	Address	City	State	Zip Code	Refund Amount (\$)
2023	0002014186-2023-00000-00	22104109	REI	621893	Informal Appeal	3/30/2024	QUICKEN LOANS	635 WOODWARD AVE	DETROIT	MI	48226	31.35
<b>TOTAL</b>											<b>31.35</b>	

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PINEVILLE Refunds

Tax Year	Bill Number	Parcel #	Source Type	Adj. #	Adj. Reason	Date of Adj.	Recipient Name	Address	City	State	Zip Code	Payment Date for Interest Calculation	Refund Amount (\$)	Total Interest to Pay if mailed on or before 5/22/2024 (\$)	Total Interest to pay if mailed on or before 6/3/2024 (\$)
2023	0002022153-2023-2023-0000-00	22151202	REI	621894	BER Decision	3/30/2024	LOGAN CAROLINA PLACE ASSOCIATES LTD C/O ROOMS TO GO TAX DEPT	PO BOX 56607	ATLANTA	GA	30343	1/6/2024	4,022.20	201.11	231.28
2023	0002019884-2023-2023-0000-00	22138415	REI	621601	BER Decision	3/30/2024	NAVIDAD, JULIO EDUARDO DELEON	10613 COPPER FIELD DR	PINEVILLE	NC	28134	1/6/2024	39.33	1.97	2.26
2023	0002014033-2023-2023-0000-00	22101101	REI	621892	BER Decision	3/30/2024	RAUGH, MARIANNA MILLER JAMES FLUMMER RAUGH JR REVOCABLE TRUST	1444 6TH STREET CIRCLE CT NW	HICKORY	NC	28601	1/6/2024	211.18	10.56	12.14
2023	0001969858-2023-2023-0000-00	20519111	REI	621881	BER Decision	3/30/2024	RYAN LLC PAYING FOR LINK INDUSTRIAL	PO BOX 4900	SCOTTSDALE	AZ	85261	1/6/2024	740.43	37.02	42.57
2023	0002016307-2023-2023-0000-00	22119148	REI	621531	BER Decision	3/30/2024	RYAN LLC PAYING FOR SAM'S HOLDING LLC	P O BOX 4900	SCOTTSDALE	AZ	85261	1/6/2024	500.46	25.02	28.78
2023	00019688171-2023-2023-0000-00	20501314	REI	621538	BER Decision	3/30/2024	SAFAIE, NIMA AND SAFAIE, SHAHAZ	4107 FOXMORE DR	CHARLOTTE	NC	28226	1/6/2024	444.03	22.20	25.53
2023	0001968813-2023-2023-0000-00	20509205	REI	621930	BER Decision	4/10/2024	SOUTH CHARLOTTE HYUNDAI	10518 CADILLAC STREET	PINEVILLE	NC	28134	1/6/2024	1,013.46	50.67	58.27
<b>TOTAL</b>													<b>6,971.09</b>	<b>348.55</b>	<b>400.83</b>

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**PINEVILLE Refunds**

Tax Year	Bill Number	Parcel #	Source Type	Adj. #	Adj. Reason	Date of Adj.	Recipient Name	Address	City	State	Zip Code	Payment Date for Interest Calculation	Refund Amount (\$)	Total Interest to Pay if mailed on or before 6/6/2024 (\$)	Total Interest to Pay if mailed on or before 6/17/2024 (\$)
2023	0001970262-2023-2023-0000-00	20708121	REI	622217	BER Decision	4/23/2024	CARMAX AUTO SUPERSTORES INC	12800 TUCKAHOE CREEK PARKWAY	RICHMOND	VA	23238	1/6/2024	4,236.52	243.60	243.60
2023	0008196826-2023-2023-0000-00	20507123	REI	622208	BER Decision	4/16/2024	LAKEMONT PROPERTY INVESTORS LLC	2400 SOUTH BLVD STE 300	CHARLOTTE	NC	28203-5773	1/6/2024	838.19	48.20	48.20
2023	0002016281-2023-2023-0000-00	22119113	REI	622260	BER Decision	4/23/2024	SLK	2727 LYNDON B JOHNSON FREEWAY SUITE 800	DALLAS	TX	75234	1/6/2024	5,476.56	314.90	314.90
<b>TOTAL</b>													<b>10,551.27</b>	<b>606.70</b>	<b>606.70</b>