



TOWN COUNCIL AGENDA ITEM

MEETING DATE: February 13, 2024

Agenda Title/Category:	Tax Refunds / Consent Agenda			
Staff Contact/Presenter:	Christopher Tucker, Finance Director			
Meets Strategic Initiative or Approved Plan:	Yes	No	If yes, list:	N/A
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 decrease by \$36K			
Attachments:	Staff Memo, Refund Guidance from County (x3)			
Recommended Motion to be made by Council:	Approve as Presented			



February 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 February 13, 2024 Council Meeting, please find attached the below tax refunds per Mecklenburg County guidance.

2023	10306 Industrial LLC	(\$547.77)
2023	CBRE Loan Services Inc / FBTM Tax Service Disb (x3)	(\$34,602.71)
2023	BMW Manufacturing Co LLC	(\$18.52)
2023	John, Richard S & Barbara B	(\$26.22)
2023	McCoy, Michael W & Alberta L	(\$36.77)
2023	Midland Loan Servicing LP	(\$526.11)
	TOTAL:	(\$35,758.10)

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 2/1/2024 (\$)	Total Interest to Pay if mailed on or before 2/12/2024 (\$)
2023	0001968787-2023-2023-0000-00	20508107	REI	617977	BER Decision	11/14/2023	10306 INDUSTRIAL LLC	PO BOX 241689	CHARLOTTE	NC	28224	1/6/2024	547.77	15.06	15.06
TOTAL													547.77	15.06	15.06

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 2/21/2024 (\$)	Total Interest to Pay if mailed on or before 3/1/2024 (\$)
2023	0002014780-2023-2023-0000-00	22109116	REI	619669	BER Decision	1/10/2024	CBRE LOAN SERVICES INC/ FBTM TAX SERVICE	929 GESSNER RD STE 1700	HOUSTON	TX	77024	1/6/2024	7,698.42	211.71	269.44
2023	0002014778-2023-2023-0000-00	22109115	REI	619671	BER Decision	1/10/2024	CBRE LOAN SERVICES INC/FBTM TAX SERVICE DISB	929 GESSNER RD STE 1700	HOUSTON	TX	77024	1/6/2024	18,620.76	512.07	651.73
2023	0002014782-2023-2023-0000-00	22109117	REI	619668	BER Decision	1/10/2024	CBRE LOAN SERVICES INC/FBTM TAX SERVICE DISB	929 GESSNER RD STE 1700	HOUSTON	TX	77024	1/6/2024	8,283.53	227.80	289.92
TOTAL													34,602.71	951.58	1,211.09

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 3/6/2024 (\$)	Total Interest to Pay if mailed on or before 3/15/2024 (\$)
2023	0008157627-2023-2023-0000-00		BUS	620185	BER Decision	1/29/2024	BMW MANUFACTURING CO LLC	PO BOX 30847	CHARLOTTE	NC	28230	1/6/2024	18.52	0.65	0.65
2023	0008097599-2023-2023-0000-00	22101655	REI	619834	BER Decision	1/18/2024	JOHN, RICHARD S AND JOHN, BARBARA B	1705 CEDAR PARK DR	PINEVILLE	NC	28134	1/6/2024	26.22	0.92	0.92
2023	0002014739-2023-2023-0000-00	22108506	REI	619780	BER Decision	1/18/2024	MCCOY, MICHAEL W AND MCCOY, ALBERTA L	PO BOX 224	PINEVILLE	NC	28134	1/6/2024	36.77	1.29	1.29
2023	0002016381-2023-2023-0000-00	22119216	REI	620001	BER Decision	1/26/2024	MIDLAND LOAN SERVICING LP (1728)	10851 MASTIN SUITE 300	OVERLAND PARK	KS	66210	1/6/2024	526.11	18.41	18.41
TOTAL													607.62	21.27	21.27