



COUNTY OF SACRAMENTO

DEPARTMENT OF FINANCE

TAX COLLECTION AND LICENSING

700 H Street, Room 1710, Sacramento, California 95814

P.O. Box 508, Sacramento, California 95812-1703

phone (916) 874-6621 • fax (916) 874-8909 • www.finance.saccounty.gov

Claim For Excess Proceeds February 2024 Public Auction Tax Sale

**Claims are processed by the County at no cost to
Parties of Interest**

Contact the Department of Finance with any questions regarding the claim process, assignments, or your rights as a party of interest:

(916) 874-6621 or Finance-TDL@saccounty.gov

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

Parcel Number: _____

Assessee: _____

Situs Address: _____

Date Sold: _____

Date Deed to Purchaser Recorded: _____

I do hereby claim excess proceeds in the amount of \$ _____ under Revenue and Taxation Code §4675.

I was a () lienholder () property owner at the time of the sale as is evidenced by the attached documents. (see page 3 for instructions) If you are assigning your claim to a person or a third party company, to collect excess proceeds on your behalf, please complete the information below. Third Party claimants will complete the Third Party claim section

CLAIMANT INFORMATION

Print Name

Address

City

Date

Zip

EXCESS PROCEEDS CLAIM FORM FEBRUARY 2024 PUBLIC AUCTION TAX SALE

Page 2

Daytime Phone: _____ Email: _____

Signature _____ Date _____

THIRD-PARTY CLAIMANT:

Name/Company _____

Phone: _____ Email: _____

Mailing Address _____

Signature: _____

Party of Interest:

Please continue to Instructions. You are required to sign that you understand the instructions and that you may file a claim directly with Sacramento County at no cost.

INSTRUCTIONS FOR FILING CLAIM

There is no cost to file a claim for excess proceeds directly with Sacramento County.

California Revenue and Taxation Code, Section §4675, states in part (paraphrased):

For the purposes of this article, 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. In the event that the person with title of record is deceased at the time distribution of excess proceeds, the heirs may submit an affidavit pursuant to Chapter 3 (commencing with §13100) of Part 1 of Division 8 of the Probate Code to support their claim for excess proceeds.
- (c) A party of interest in the property at the time of sale may assign his or her right to claim 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 the 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 and that the party of interest can file at no charge directly with the County at no cost to them. (§4675).

If you believe you qualify as a party of interest in the sale of tax-defaulted property described on the enclosed claim hereof, please fill out the form stating how you have determined your status as a party of interest. If you need assistance filling out the form, please contact our office by telephone at: (916) 874-6621 or via email at Finance-TDL@sacounty.net.

You must attach original supporting documents to support your claim as follows:

- (a) In case (a) above, Trust Deed beneficiaries must submit the original deed of trust, trust deed and any assignments, evidencing the lien or security interest along with a statement setting forth the original amount of the lien, the total amount of payments received reducing the original amount of the lien, and the amount that was still due and payable as of the date of the sale of tax-defaulted property by the tax collector. If you are a judgment creditor or other type of lien holder, you must also submit a statement setting forth the original amount of the lien, the total amount of payments received reducing the original amount of the lien, and the amount that was still due and payable as of the date of the sale of the tax-defaulted property by the tax collector. In addition, judgment creditors must also submit verifiable proof that the judgment debtor is the person(s) who possessed record ownership of the property sold at tax sale.
- (b) In case (b) above, you must submit original recorded documents (e.g., deed, death certificate, court order, probate order, letters of administration issued by the probate court, etc.) supporting your claim. **You must also submit a notarized verification that you are the person named in the document where you acquired title and photo proof of identity (i.e., current driver's license, passport, etc.).** You should also submit supporting documentation such as utility payments, property improvement/repair receipts and other such types of documents to prove your claim. If you are claiming as an heir pursuant to Chapter 3 of the Probate Code, in addition

to the above required documentation, you must also submit a properly completed affidavit and notarized verification of proof of identity.

- (c) In case (c) above, you must submit, in addition to the proof required of lien holders and persons with title of record, proof in the form of a verified affidavit executed by all parties to the assignment. The affidavit signed by all parties to the assignment presented to the county must include a statement that the amount of excess proceeds has been disclosed to the party of interest and that the party of interest has been advised of his or her right to file a claim for the excess proceeds on his or her behalf directly with the County at no cost to them. (§4675).

PLEASE NOTE: Claims will begin to be processed after one year has passed from the date of the recording of the deed to the purchaser. **In order 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. Following a review, the Tax Collector will notify you of the action taken and give ninety (90) days to dispute the distribution. Should the claim be approved, and there are no disputes to the distribution, the Sacramento County Auditor-Controller will, after approximately ninety (90) days, issue a county warrant for payment. IF YOUR MAILING ADDRESS CHANGES DURING THE CLAIMING, DISPUTE, OR DISBURSEMENT PERIODS, PLEASE CONTACT OUR OFFICE AS SOON AS POSSIBLE.

Mail Completed Claim Forms and supporting documents to:

**Sacramento County Department of Finance
Tax-Defaulted Land Unit
ATTN: EXCESS PROCEEDS ADMINISTRATION
700 "H" Street, Room 1710
Sacramento, CA 95814-1214**

If you require a large-print version of this form, please contact the Tax-Defaulted Land Unit at 916-874-6621 or by email: Finance-TDL@saccounty.gov.

CLAIMANT (Party of Interest Only):

By signing below, I am indicating that I understand the instructions for claiming Excess Proceeds and I am also attesting that I understand that I can file a claim directly with the County of Sacramento at no cost to me:

Print Name: _____

Signature: _____

Date: _____