

FORM APPROVED COUNTY COUNSEL
 BY: GREGORY P. PRIAMOS DATE: 1/12/15

Departmental Concurrence

**SUBMITTAL TO THE BOARD OF SUPERVISORS
 COUNTY OF RIVERSIDE, STATE OF CALIFORNIA**

358A



**SUBMITTAL DATE:
 JAN 12 2015**

FROM: Don Kent, Treasurer/Tax Collector

SUBJECT: Recommendation for Distribution of Excess Proceeds for Tax Sale No. 194, Item 173. Last assessed to: The Ward Family Trust. District 4 [\$12,316] Fund 65595 Excess Proceeds from Tax Sale.

RECOMMENDED MOTION: That the Board of Supervisors:
 1. Approve the claim from Global Discoveries, Ltd., assignee for Roger Ward, Successor Trustee of The Ward Family Trust for payment of excess proceeds resulting from the Tax Collector's public auction sale associated with parcel 664100020-9;
 (continued on page two)

**BACKGROUND:
 Summary**

(continued on page two)

Don Kent

Don Kent
 Treasurer-Tax Collector

FINANCIAL DATA	Current Fiscal Year:	Next Fiscal Year:	Total Cost:	Ongoing Cost:	POLICY/CONSENT (per Exec. Office)
COST	\$ 12,316	\$ 0	\$ 12,316	\$ 0	Consent <input type="checkbox"/> Policy <input checked="" type="checkbox"/>
NET COUNTY COST	\$ 0	\$ 0	\$ 0	\$ 0	

SOURCE OF FUNDS: Fund 65595 Excess Proceeds from Tax Sale
Budget Adjustment: N/A
For Fiscal Year: 14/15

C.E.O. RECOMMENDATION: APPROVE
 BY: Samuel Wong 3/12/15
 Samuel Wong
 County Executive Office Signature

MINUTES OF THE BOARD OF SUPERVISORS

- A-30
- Positions Added
- 4/5 Vote
- Change Order

Prev. Agn. Ref.: _____ District: 4 Agenda Number: _____

9-47

SUBMITTAL TO THE BOARD OF SUPERVISORS, COUNTY OF RIVERSIDE, STATE OF CALIFORNIA
FORM 11: Recommendation for Distribution of Excess Proceeds for Tax Sale No. 194, Item 173. Last assessed to: The Ward Family Trust. District 4 [\$12,316] Fund 65595 Excess Proceeds from Tax Sale.
DATE: JAN 12 2015
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RECOMMENDED MOTION:

2. Authorize and direct the Auditor-Controller to issue a warrant to Global Discoveries, Ltd., assignee for Roger Ward, Successor Trustee of The Ward Family Trust, in the amount of \$12,316.73, no sooner than ninety days from the date of this order, unless an appeal has been filed in Superior Court, pursuant to the California Revenue and Taxation Code Section 4675.

BACKGROUND:

Summary (continued)

In accordance with Section 3691 et seq. of the California Revenue and Taxation Code, and with prior approval of the Board of Supervisors, The Tax Collector conducted the February 4, 2013 public auction sale. The deed conveying title to the purchasers at the auction was recorded April 1, 2013. Further, as required by Section 4676 of the California Revenue and Taxation Code, notice of the right to claim excess proceeds was given on April 24, 2013, to parties of interest as defined in Section 4675 of said code. Parties of interest have been determined by an examination of lot book reports as well as Assessor's and Recorder's records, and various research methods were used to obtain current mailing addresses for these parties of interest.

The Treasurer-Tax Collector has received one claim for excess proceeds:

1. Claim from Global Discoveries, Ltd., assignee for Roger Ward, Successor Trustee of The Ward Family Trust, based on an Assignment of Right to Collect Excess Proceeds dated October 29, 2013, a Warranty Deed recorded April, 18, 2003 as Instrument No. 2003-274217, the Revocable Living Trust of Jeremy P. Ward and Pauline Ward dated January 4, 1991, a Certification of Trustees under Trust dated October 29, 2013 and the death certificates of Jeremy Plummer Ward and Pauline Constance Ward.

Pursuant to Section 4675 (a) & (b) & (f) of the California Revenue and Taxation Code, it is the recommendation of this office that Global Discoveries, Ltd., assignee for Roger Ward, Successor Trustee of The Ward Family Trust be awarded excess proceeds in the amount of \$12,316.73. Supporting documentation has been provided. The Tax Collector requests approval of the above recommended motion.

Impact on Citizens and Businesses

Excess proceeds are being released to the successor trustee for the last assessee's of the property.

ATTACHMENTS (if needed, in this order):

Copy of the Excess Proceeds Claim form and supporting documentation are attached.