

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



ITEM: 19.18  
(ID # 24029)

MEETING DATE:  
Tuesday, May 21, 2024


FROM : TREASURER-TAX COLLECTOR:

SUBJECT: TREASURER-TAX COLLECTOR: Public Hearing on the Recommendation for Distribution of Excess Proceeds for Tax Sale No. 217, Item 4026. Last assessed to: James Michael Alfred. District 1. [\$251,562-Fund 65595 Excess Proceeds from Tax Sale]

RECOMMENDED MOTION: That the Board of Supervisors:

1. Approve the claim from James Michael Alfred, last assessee for payment of excess proceeds resulting from the Tax Collector's public auction sale associated with parcel 227124007; and
2. Authorize and direct the Auditor-Controller to issue a warrant to James Michael Alfred in the amount of \$251,562.82, 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.

ACTION:Policy

  
Matthew Jennings, Treasurer-Tax Collector 5/8/2024

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MINUTES OF THE BOARD OF SUPERVISORS

On motion of Supervisor Perez, seconded by Supervisor Spiegel and duly carried, IT WAS ORDERED that the above matter is approved as recommended.

Ayes: Jeffries, Spiegel, Washington and Perez  
Nays: None  
Absent: Gutierrez  
Date: May 21, 2024  
xc: Tax Collector

Kimberly A. Rector  
Clerk of the Board

By:   
Deputy

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

<b>FINANCIAL DATA</b>	<b>Current Fiscal Year:</b>	<b>Next Fiscal Year:</b>	<b>Total Cost:</b>	<b>Ongoing Cost</b>
<b>COST</b>	\$ 251,562	\$ 0	\$ 251,562	\$ 0
<b>NET COUNTY COST</b>	\$ 0	\$ 0	\$ 0	\$ 0
<b>SOURCE OF FUNDS: Fund 65595 Excess Proceeds from Tax Sale.</b>			<b>Budget Adjustment:</b>	N/A
			<b>For Fiscal Year:</b>	23/24

**C.E.O. RECOMMENDATION:** Approve

**BACKGROUND:**

**Summary**

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 May 18, 2021 public auction sale. The deed conveying title to the purchasers at the auction was recorded July 28, 2021. Further, as required by Section 4676 of the California Revenue and Taxation Code, notice of the right to claim excess proceeds was given on August 4, 2021 to parties of interest as defined in Section 4675 of said code. Parties of interest have been determined by an examination of Parties of Interest Reports, Assessor's and Recorder's records, as well as other, various research methods 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 James Michael Alfred based on an Order Waiver of Final Account and Decree of Final Distribution recorded February 27, 1995 as Instrument No. 1995-060041.

Pursuant to Section 4675 of the California Revenue and Taxation Code, it is the recommendation of this office that James Michael Alfred be awarded excess proceeds in the amount of \$251,562.82. Supporting documentation has been provided. The Tax Collector requests approval of the above recommended motion. Notice of this recommendation was sent to the claimant by certified mail.

**Impact on Residents and Businesses**

Excess proceeds will be released to the last assessee of the property.

**ATTACHMENTS (if any, in this order):**

**ATTACHMENT A. Claim Alfred**

  
Cesar Bernal, PRINCIPAL MGMT ANALYST 5/10/2024

  
Aaron Gettis, Chief of Deputy County Counsel 3/12/2024

CLAIM FOR EXCESS PROCEEDS FROM THE SALE OF TAX-DEFAULTED PROPERTY

To: Matthew Jennings, Treasurer-Tax Collector

Re: Claim for Excess Proceeds

TC 217 ITEM 4026 Parcel Identification Number: 227124007

Assessee: ALFRED, JAMES MICHAEL

Situs:

Date Sold: May 18, 2021

Date Deed to Purchaser Recorded: July 28, 2021

Final Date to Submit Claim: July 28, 2022

I/We, pursuant to Revenue and Taxation Code Section 4675, hereby claim excess proceeds in the amount of \$251,562.82 from the sale of the above mentioned real property. I/We were the [ ] lienholder(s), [X] property owner(s) [check in one box] at the time of the sale of the property as is evidenced by Riverside County Recorder's Document No. 60041; recorded on FEB 22, 1995. A copy of this document is attached hereto. I/We are the rightful claimants by virtue of the attached assignment of interest. I/We have listed below and attached hereto each item of documentation supporting the claim submitted.

NOTE: YOUR CLAIM WILL NOT BE CONSIDERED UNLESS THE DOCUMENTATION IS ATTACHED.

Four horizontal lines for listing documentation supporting the claim.

If the property is held in Joint Tenancy, the taxsale process has severed this Joint Tenancy, and all Joint Tenants will have to sign the claim unless the claimant submits proof that he or she is entitled to the full amount of the claim, the claimant may only receive his or her respective portion of the claim.

I/We affirm under penalty of perjury that the foregoing is true and correct.

Executed this 2ND day of MARCH, 2022 at RIVERSIDE, CA County, State

James Michael Alfred Signature of Claimant

Signature of Claimant

JAMES MICHAEL ALFRED Print Name

Print Name

3734 ROSLYN ST Street Address

Street Address

RIVERSIDE, CA 92504 City, State, Zip

City, State, Zip

951-689-2872 Phone Number

Phone Number

jmalfred@hotmail.com Email Address

Email Address

RECEIVED 2022 MAR -2 PM 3:20 RIVERSIDE COUNTY TREAS-TAX COLLECTOR

060041

PLEASE COMPLETE THIS INFORMATION  
RECORDING REQUESTED BY:

RECEIVED FOR RECORD  
AT 8:00 O'CLOCK

AND WHEN RECORDED MAIL TO:

D. S. McNeil  
27624 Cottonwood Ave.  
Mono Valley, Ca.  
92555

FEB 27 1995

Recorder in Official Records  
of Riverside County, California

Recorder  
Fee \$ 21

THIS SPACE FOR RECORDER'S USE ONLY

Order waives of Final Account  
and Decree of Final  
Distribution

21  
5  
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Title of Document

THIS PAGE ADDED TO PROVIDE ADEQUATE SPACE FOR RECORDING INFORMATION  
(\$3.00 Additional Recording Fee Applies)

60041

Case No. 067987

FILED  
FOR PROBATE

FEB 22 1995

CLERK SUPERIOR COURT

By: *[Signature]* Deputy

1 DAVID SCOTT McNEIL  
2 27624 Cottonwood Ave.  
3 Moreno Valley, CA 92555  
4 IN PRO PER  
5 (909) 242-0758

8 SUPERIOR COURT OF CALIFORNIA, COUNTY OF RIVERSIDE

11 Estate of ) Case No. 067987  
12 )  
13 KEITH W. CHALMERS, also known ) ORDER WAIVER OF FINAL ACCOUNT  
14 as KEITH WALDOW CHALMERS, ) AND DECREE OF FINAL DISTRIBUTION  
Deceased. )

15  
16 The Waiver of Final Account and Petition for Final  
17 Distribution of DAVID SCOTT McNEIL, Personal Representative of the  
18 Estate of KEITH W. CHALMERS, Deceased, came on regularly for  
19 hearing on February 22, 1995, before Judge WILLIAM H. SULLIVAN.

20 No one appeared to contest the petition.

21 On proof made to the satisfaction of the court, the court  
22 finds as follows:

- 23 1. Due notice of the time and place of the hearing has been  
24 given as required by law.  
25 2. The facts alleged in the petition are true.  
26 3. Decedent died on July 18, 1994.  
27 4. At the time of his death, decedent was a resident of the  
28 above-named county.

1 5. Decedent's Will dated December 3, 1992, was admitted to  
2 probate by this court on September 13, 1994.

3 6. Letters were issued to petitioner on September 13, 1994.  
4 Petitioner was given authority to administer the estate under the  
5 Independent Administration of Estates Act.

6 7. Notice of Death and of Petition to Administer Estate was  
7 duly published and Notice of Death was given to the Director of  
8 Health Services on July 29, 1994, pursuant to Probate Code §(9202)  
9 (700.1). No claim has been filed by them.

10 8. Petitioner made a thorough and diligent search of the  
11 decedent's available records. No creditors of the decedent were  
12 ascertained.

13 9. No claims against the estate have been filed or  
14 presented.

15 10. The debts of decedent which have been paid without  
16 verified claims having been timely filed or presented were paid by  
17 petitioner in good faith, it appearing that such debts were justly  
18 due, that the amounts paid were the true amounts of such  
19 indebtednesses over and above all payments or set-offs, and that  
20 the estate is solvent.

21 11. Petitioner has kept all of the estate cash in  
22 interest-bearing accounts or investments, except such amounts of  
23 cash as were reasonably necessary for the orderly administration  
24 of the estate.

25 12. No California or federal estate, inheritance, income, or  
26 personal property taxes are due. The total amount of California  
27 and federal income taxes due have been paid.

28 13. Petitioner did not need to file a final account because  
he is the sole residuary beneficiary and adequate provisions have

1    been made for the full satisfaction of persons entitled to  
2    specific bequests under the decedent's Will.

3           14. The estate is in a condition to be distributed and  
4    closed. All debts of the estate and of decedent and all expenses  
5    of administration have been paid.

6           Petitioner has waived all rights to compensation for services  
7    rendered.

8           15. The entire estate consists of decedent's separate  
9    property.

10          16. IT IS ORDERED that:

11                 16.1 All acts of petitioner as personal representative  
12    of decedent's estate are hereby ratified and approved.

13                 16.2 The waiver of the final account of the personal  
14    representative of decedent's estate is hereby allowed and  
15    approved.

16                 16.3 Petitioner is hereby authorized and directed to  
17    distribute specific items of estate property as set forth below:

18    TO: PAUL DEAL, LAURIE (EUSEY) DEAL, now known as LAURIE DEAL,  
19    DAVID SCOTT McNEIL and JAMES MICHAEL ALFRED, in equal shares

20    1. Phonograph, tape recorders, radios, records and tapes

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22    TO: KEITH McNEIL

23    2. Yamaha guitar

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25    TO: CHESTER N. ROISTACHER

26    3. Levin guitar

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TO: KATHERINE RICHTER

- 4. Flutes, recorders and flageolets

TO: DAVID SCOTT McNEIL

- 5. Collections of sheet and bound music

TO: JAMES MICHAEL ALFRED

- 6. Mason & Hamlin grand piano

TO: DAVID SCOTT McNEIL and JAMES MICHAEL ALFRED in equal shares

- 7. Library of books, bookshelves, personal diaries and journals

TO: JAMES MICHAEL ALFRED

- 8. Improved real property located at 4136 Via San Luis, Riverside, California, in the County of Riverside, and further described as follows:

Lot 27 of HEERS SUBDIVISION No. 2, as shown by Map on file in Book 24 page 18 of Maps, records of Riverside County, California

Parcel No. 227-124-007

16.4 Petitioner is authorized and directed to distribute the decedent's remaining estate (residue of the estate), consisting of the following property

TO: DAVID SCOTT McNEIL

- 1. Balance in Merrill Lynch Account No.
- 2. Balance in Merrill Lynch - Cash Management Account No.  
Balance in Estate Checking Account at Merrill Lynch
- 3. Miscellaneous furniture and furnishings and personal effects





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Case No. 067987

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4. 1963 Chev. Wagon. Lic No. ID No.

including any property of the estate that is presently unknown or that may be discovered in the future, whether owned by decedent at the time of death or subsequently acquired by the estate, and any property that may hereafter be acquired by the estate.

DATED: FEB 22 1995

WILLIAM H. SULLIVAN  
JUDGE OF THE SUPERIOR COURT

This must be in red to be a  
"CERTIFIED COPY"

Each document to which this certificate is attached is certified to be a full, true and correct copy of the original on file and of record in my office.

*[Signature]*

ARTHUR A. SIMS, CLERK  
Superior Municipal Courts  
County of Riverside  
State of California

Dated: 2-22-95



Certification must be in red to be a  
"CERTIFIED COPY"