

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



**ITEM:** 19.23  
(ID # 24163)

**MEETING DATE:**  
Tuesday, July 30, 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 4491. Last assessed to: Clarence O. Chapman, a single man. District 2. [\$40,956-Fund 65595 Excess Proceeds from Tax Sale]

**RECOMMENDED MOTION:** That the Board of Supervisors:

1. Approve the claim from Asset Recovery, Inc., Assignee for Morgan L. Morales, heir to the Estate of Clarence O. Chapman, last assessee for payment of excess proceeds resulting from the Tax Collector's public auction sale associated with parcel 387254053; and
2. Authorize and direct the Auditor-Controller to issue a warrant to Asset Recovery, Inc., Assignee for Morgan L. Morales, heir to the Estate of Clarence O. Chapman in the amount of \$40,956.19, 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

  
Melissa Johnson, Assistant Tax Collector 7/17/2024

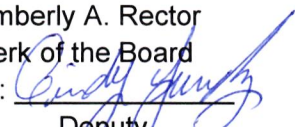
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**MINUTES OF THE BOARD OF SUPERVISORS**

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

Ayes: Jeffries, Spiegel, Washington, Perez and Gutierrez  
Nays: None  
Absent: None  
Date: July 30, 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>	\$ 40,956	\$ 0	\$ 40,956	\$ 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>	24/25

**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 Asset Recovery, Inc., Assignee for Morgan L. Morales, heir to the Estate of Clarence O. Chapman based on an Assignment of Rights to Claim Excess Proceeds from Sale of Tax-Defaulted Property notarized May 26, 2021, a Grant Deed recorded December 8, 1976 as Instrument No. 1976-188632, an Affidavit for Collection of Personal Property notarized May 26, 2021, and a Certificate of Death for Clarence Otto Chapman.

Pursuant to Section 4675 of the California Revenue and Taxation Code, it is the recommendation of this office that Asset Recovery, Inc., Assignee for Morgan L. Morales, heir to the Estate of Clarence O. Chapman be awarded excess proceeds in the amount of \$40,956.19. Supporting documentation has been provided. The Tax Collector requests approval of the above recommended motion. Notice of this recommendation was sent to the claimants by certified mail.

**Impact on Residents and Businesses**

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

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

**ATTACHMENT A. Claim Asset**

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

*Cesar Bernal*  
Cesar Bernal, PRINCIPAL MGMT ANALYST 7/19/2024

*Aaron Gettis*  
Aaron Gettis, Chief of Deputy County Counsel 4/2/2024

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 4491 Parcel Identification Number: 387254053

Assessee: CHAPMAN, CLARENCE O

Situs:

Date Sold: May 18, 2021

Date Deed to Purchaser Recorded: July 28, 2021

Final Date to Submit Claim: July 28, 2022

RECEIVED  
2022 JUN 16 AM 11:32  
RIVERSIDE COUNTY  
TREAS-TAX COLLECTOR

I/We, pursuant to Revenue and Taxation Code Section 4675, hereby claim excess proceeds in the amount of \$ 100% from the sale of the above mentioned real property. I/We were the  lienholder(s),  Assignee  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. \_\_\_\_\_; recorded on \_\_\_\_\_. 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.

Assignment of Interest  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

If the property is held in Joint Tenancy, the tax sale 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 11th day of June, 2022 at Denver, CO  
County, State

[Signature] Managing Director  
Asset Recovery Inc.  
Signature of Claimant Signature of Claimant

John Fox  
Print Name Print Name

910 16th St. Suite 624  
Street Address Street Address

Denver, CO 80202  
City, State, Zip City, State, Zip

(303) 454-3707  
Phone Number Phone Number

**TO: OFFICE OF THE COUNTY TREASURER AND TAX COLLECTOR**

**ASSIGNMENT OF RIGHTS TO CLAIM EXCESS PROCEEDS FROM  
SALE OF TAX-DEFAULTED PROPERTY**

For valuable consideration, the undersigned Assignor(s) Morgan L Morales hereby assigns to Assignee(s) Asset Recovery Inc., all rights, title and interest to collect 100 % of the excess proceeds which I am entitled to claim for the property which was sold at the Riverside County, California, public auction of tax-defaulted property, held on 18 day of May 2021, and described as parcel number 387254053.

As the Assignor(s), I understand the amount of the excess proceeds eligible for distribution is \$41,814.00, and as a party of interest I am entitled to \$ up to \$41,814.00.

Dated this 26 day of May, [Signature]  
Signature

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

STATE OF California

COUNTY OF Sacramento

On 5/26/2021 before me, Stephany Booth, notary public personally

appeared Morgan L Morales, who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal

[Signature]  
Signature



(Seal)

**DECLARATION**

I, Assignor(s) Morgan L Morales Declare the following to be true and correct with respect to my assignment of rights to claim excess proceeds to Assignee(s) Asset Recovery Inc for Parcel Number 387254053 from the public auction of tax-defaulted property held on 18 day of May 2021, in Riverside County, California.

We have been advised of our right to file a claim for excess proceeds on our behalf. The parties have disclosed all facts to each other that each is aware of regarding the value of the rights being assigned as required by California Revenue and Taxation Code, Section 4675.

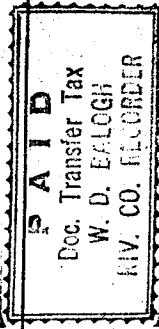
We declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date 5/26/21 Signature [Signature]  
Name (print) Morgan L Morales Address 3913 Woodpointe Cir  
City/State/zip Code Sacramento, CA 95814 Phone ( ) \_\_\_\_\_

188632

Order No.  
Escrow No. 1513170-CD  
Loan No.

WHEN RECORDED MAIL TO:  
Clarence O. Chapman  
3206 Cabot Drive. Apt. 4  
Anaheim, CA 92804



RECEIVED FOR RECORD

DEC 8 1976

Min. Past Clock P.M.

At Request of

FIRST AMERICAN TITLE CO.

Book 1976, Page 188632

Recorded in Official Records of Riverside County, California

W.D. Balogh Recorder

FEES \$

SPACE ABOVE THIS LINE FOR RECORDER'S USE

MAIL TAX STATEMENTS TO:  
SAME AS ABOVE

DOCUMENTARY TRANSFER TAX \$ 5.50

..... Computed on the consideration or value of property conveyed; OR  
..... Computed on the consideration or value less liens or encumbrances remaining at time of sale.

*Mary E. Pelz*  
Signature of Declarant or Agent determining tax - Firm Name

### GRANT DEED

FOR A VALUABLE CONSIDERATION, receipt of which is hereby acknowledged,  
MARY E. PELZ, also known as MARY ELIZABETH PELZ, a widow

hereby GRANT(S) to

CLARENCE O. CHAPMAN, a single man  
the real property in the City of Elsinore  
County of Riverside

State of California, described as

Lots 20 and 21 in Block "C" of GRANDVIEW GARDENS, as shown by Map on file in Book 11 Page 39 of Maps, Records of Riverside County, California.

1513170 ORL

Dated October 19, 1976

*Mary E. Pelz*  
MARY E. PELZ

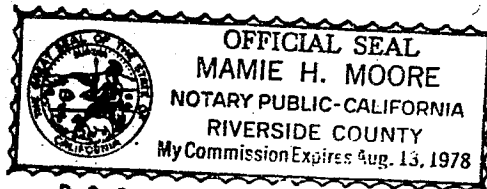
STATE OF CALIFORNIA  
COUNTY OF Riverside ss.

On October 21, 1976  
before me, the undersigned, a Notary Public in and for said  
State, personally appeared Mary E. Pelz

known to me to be the person whose name is  
subscribed to the within instrument and acknowledged that  
she executed the same.

WITNESS my hand and official seal.

Signature Mamie H. Moore



P. O. Box 336, Lake Elsinore, CA. 92330

(This area for official notarial seal)

MAIL TAX STATEMENTS AS DIRECTED ABOVE

1002 (10/69)

END RECORDED DOCUMENT

W. D. BALOGH, COUNTY RECORDER

STATE OF CALIFORNIA

CERTIFICATION OF VITAL RECORD

COUNTY OF RIVERSIDE

RIVERSIDE, CALIFORNIA

3052015075436

CERTIFICATE OF DEATH

3201533004456

Form with sections: DECEDENT'S PERSONAL DATA, USUAL RESIDENCE, INFORMANT, SPOUSE/SRDP AND PARENT INFORMATION, FUNERAL DIRECTORY/LOCAL REGISTRAR, PLACE OF DEATH, CAUSE OF DEATH, PHYSICIAN'S CERTIFICATION, CORONER'S USE ONLY, STATE REGISTRAR.

CERTIFIED COPY OF VITAL RECORD STATE OF CALIFORNIA, COUNTY OF RIVERSIDE



This is a true and exact reproduction of the document officially registered and placed on file in the office of the County of Riverside, Assessor-County Clerk-Recorder.

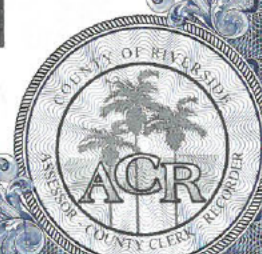
MAY 28 2021

DATE ISSUED

Peter Aldana, ASSESSOR-COUNTY CLERK-RECORDER, RIVERSIDE COUNTY, CALIFORNIA

This copy is not valid unless prepared on an engraved border displaying the date, seal and signature of the Assessor-County Clerk-Recorder.

ANY ALTERATION OR ERASURE VOIDS THIS CERTIFICATE



CARTERSO2

# STATE OF CALIFORNIA

## CERTIFICATION OF VITAL RECORD

# COUNTY OF RIVERSIDE

RIVERSIDE, CALIFORNIA

3052015075436

STATE FILE NUMBER

1.1

### AFFIDAVIT TO AMEND A RECORD

NO ERASURES, WHITEOUTS, PHOTOCOPIES,  
OR ALTERATIONS

3201533004456

LOCAL REGISTRATION NUMBER

BIRTH     DEATH     FETAL DEATH

TYPE OR PRINT CLEARLY IN BLACK INK ONLY – THIS AMENDMENT BECOMES AN ACTUAL PART OF THE OFFICIAL RECORD

#### PART I INFORMATION TO LOCATE RECORD

INFORMATION AS IT APPEARS ON ORIGINAL RECORD	1A. NAME—FIRST <b>CLARENCE</b>	1B. MIDDLE <b>OTTO</b>	1C. LAST <b>CHAPMAN</b>	
	2. SEX <b>M</b>	3. DATE OF EVENT—MM/DD/CCYY <b>04/13/2015</b>	4. CITY OF EVENT <b>CORONA</b>	5. COUNTY OF EVENT <b>RIVERSIDE</b>
	6. FULL NAME OF FATHER/PARENT AS STATED ON ORIGINAL RECORD <b>CHARLES - CHAPMAN</b>		7. FULL NAME OF MOTHER/PARENT AS STATED ON ORIGINAL RECORD <b>ETTA MAE ELAM</b>	
	<b>2 OF 2</b>			

#### PART II STATEMENT OF CORRECTIONS TO BIRTH, DEATH, OR FETAL DEATH RECORD

8. ITEM NUMBER TO BE CORRECTED	9. INCORRECT INFORMATION THAT APPEARS ON ORIGINAL RECORD	10. CORRECTED INFORMATION AS IT SHOULD APPEAR
40	RES OF SHARON D. CHAPMAN, 7750 LIBERTY AVENUE, CORONA, CA 92881	N 33 42 W 117 35 30,
41	CR/RES	CR/SCAT

REASON FOR CORRECTION

11. INCORRECT TYPE AND PLACE OF DISPOSITION

AFFIDAVITS AND SIGNATURES

**We, the undersigned, hereby certify under penalty of perjury that we have personal knowledge of the above facts and that the information given above is true and correct.**

TWO PERSONS MUST SIGN THIS FORM TO CORRECT A BIRTH, DEATH, OR FETAL DEATH RECORD	12A. SIGNATURE OF FIRST PERSON <b>GREGG WALKER</b>	12B. PRINTED NAME <b>GREGG WALKER</b>	12C. TITLE/RELATIONSHIP TO PERSON IN PART I <b>FUNERAL DIRECTOR</b>
	12D. ADDRESS (STREET and NUMBER, CITY, STATE, ZIP) <b>815 S. MAIN STREET, CORONA, CA 92882</b>		12E. DATE SIGNED—MM/DD/CCYY <b>04/16/2015</b>
STATE/LOCAL REGISTRAR USE ONLY	13A. SIGNATURE OF SECOND PERSON <b>TRAVIS WALKER</b>	13B. PRINTED NAME <b>TRAVIS WALKER</b>	13C. TITLE/RELATIONSHIP TO PERSON IN PART I <b>FUNERAL ASSISTANT</b>
	13D. ADDRESS (STREET and NUMBER, CITY, STATE, ZIP) <b>815 S. MAIN STREET, CORONA, CA 92882</b>		13E. DATE SIGNED—MM/DD/CCYY <b>04/16/2015</b>
14. OFFICE OF VITAL RECORDS OR LOCAL REGISTRAR <b>STATE REGISTRAR - OFFICE OF VITAL RECORDS</b>			15. DATE ACCEPTED FOR REGISTRATION <b>04/21/2015</b>

STATE OF CALIFORNIA, DEPARTMENT OF PUBLIC HEALTH, OFFICE OF VITAL RECORDS



\*020101002916184\*

FORM VS 24e (REV. 1/08)

1.1

**CERTIFIED COPY OF VITAL RECORD**  
STATE OF CALIFORNIA, COUNTY OF RIVERSIDE

This is a true and exact reproduction of the document officially registered and placed on file in the office of the County of Riverside, Assessor-County Clerk-Recorder.

**MAY 28 2021**

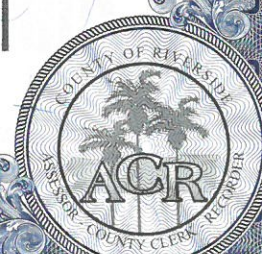
DATE ISSUED \_\_\_\_\_

This copy is not valid unless prepared on an engraved border displaying the date, seal and signature of the Assessor-County Clerk-Recorder.



**035021818**

*Peter Aldana*  
**PETER ALDANA**  
ASSESSOR-COUNTY CLERK-RECORDER  
RIVERSIDE COUNTY, CALIFORNIA



**ANY ALTERATION OR ERASURE VOIDS THIS CERTIFICATE**



**Affidavit for Collection of Personal Property**  
California Probate Code Section 13100

The undersigned state(s) as follows:

1. Clarence O Chapman died on April 13th, 2015, in the County of Riverside, State of California.

2. At least 40 days have elapsed since the death of the decedent, as shown in a certified copy of the decedent's death certificate attached to this affidavit or declaration.

3.  No proceeding is now being or has been conducted in California for administration of the decedent's estate.

OR

The decedent's personal representative has consented in writing to the payment, transfer, or delivery to the affiant or declarant of the property described in the affidavit or declaration.

4. The current gross fair market value of the decedent's real and personal property in California, excluding the property described in Section 13050 of the California Probate Code, does not exceed one hundred fifty thousand dollars (\$150,000).

5.  An inventory and appraisal of the real property included in the decedent's estate is attached.

There is no real property in the estate.

6. The following property to be transferred, delivered, or paid to the affiant under the provisions of California Probate Code section 13100:

Excess proceeds resulting from tax sale of property located in Lake Elsinore CA 92530 known as APN 387254053

7. The successor(s) of the decedent, as defined in Probate Code Section 13006 is/are:

Morgan L Morales (surviving daughter)

8. The undersigned

The affiant or declarant is the successor of the decedent (as defined in Section 13006 of the California Probate Code) to the decedent's interest in the described property.

The affiant or declarant is authorized under Section 13051 of the California Probate Code to act on behalf of the successor of the decedent (as defined in Section 13006 of the California Probate Code) with respect to the decedent's interest in the described property.

9. No other person has a superior right to the interest of the decedent in the described property.

10. The affiant or declarant requests that the described property be paid, delivered, or transferred to the affiant or declarant.

The affiant or declarant affirms or declares under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Dated: 5/26/21

Signed: 

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## ACKNOWLEDGMENT

A Notary Public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

State of California

County of sacramento )

On 5/20/21 before me, Stephany Booth, notary public  
(insert name and title of the officer)

personally appeared Morgan L. Morales who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

Signature [Signature] (Seal)

