

How to Claim Surplus Taxes

(Note: Print off these instructions/form and use as a guide to claiming your surplus. Submit this form along with proof of payment as indicated below.)

1. Search the Surplus Database using any of the criteria listed there.
2. If you find surplus you are entitled to fill in the information returned in the spaces below:

Owner Name (as shown): _____

Address (as shown): _____

Surplus Amount \$ _____ Type _____ Year _____

PIN Number (if any) _____

Control Number (if any) _____

Duplicate Number (if any) _____

3. Please provide proof of **ALL** property tax payments made in the year listed above. (Why are proofs needed? See the Frequently Asked Questions (FAQ) on page two).

Acceptable Proof(s) of Payment Include:

- a. Copies of cancelled checks made out to the Allen County Treasurer (carbon copies are **not** acceptable).
- b. The stamped receipt from the bank if a payment was made there.
- c. Bank statement(s) showing payment to the Allen County Treasurer.
- d. Form 1098 issued by your bank/mortgage company showing property taxes paid.
- e. An escrow history printout from your mortgage company showing property tax payments. (A letter from your mortgage company simply stating you paid your property taxes is **not** acceptable proof.)
- f. Settlement Statement from your closing showing property taxes paid.

4. Sign this form below and submit it with **copies** of your proofs of payment to:

Allen County Auditor's Office
Attn: **Surplus Deputy**
City County Building
1 East Main Street, Room 102
Fort Wayne, IN 46802

I affirm that I am entitled to the surplus listed above and wish to claim the same. My proofs of payment are enclosed.

Signed _____ Date _____

Phone Number _____

Frequently Asked Questions (FAQ)

1. What is Surplus property tax?

A: Surplus is created when the amount of property tax payments received exceeds the property taxes owed in a specific tax year.

2. Why do I need to provide proofs of payment?

A: Proof of payment is required by state statute I.C. 6-1.1-26-6. As a practical matter, proof of payment protects against fraudulent claims and errors that could have occurred during the payment or posting process.

3. Can I have my surplus applied to my spring or fall property taxes?

A: No. State Statute I.C. 6-1.1-26-6 allows the Auditor's Office to return surplus only. It does not give a provision for applying surplus to any other taxes.

4. What happens if I don't claim my surplus?

A: After three years, unclaimed surplus is deposited into the County's General Fund as provided by state statute I.C. 6-1.1-26-6.

5. How long do I have to claim my surplus refund?

A: As provided by state Statute I.C. 6-1.1-26-6 you have three years to claim surplus.

6. Can I bring my proofs into the Auditor's Office rather than mailing them?

A: Yes. The Auditor's Office is open Monday through Friday, 8:00 am to 5:00 pm and is located in the City County Building, 1 East Main Street, Room 102.

7. How long will it take to get my refund?

A: Many factors will affect the amount of time it takes to process your refund. We ask that you allow four to six weeks for the processing of your surplus.

8. Where can I get answers to questions not listed here?

A: Please contact the Auditor's Office, we will be happy to assist you. You may contact us by phone at 260-449-7241, by e-mail at ACAuditor@AllenCounty.US or by mail as indicated on the bottom of page 1.