

# Trying to Claim Your Refund?

**Find out how to claim your real estate tax overpayment**

So, you think you may be due a refund? First make sure the surplus amount belongs to you and not another party. Overpayments can occur for several reasons. Often they are the result of recent ownership changes where both the previous and current owners make payment toward the same tax charges. Sometimes they are the result of adjustments to the tax charges made after the billing has occurred and payments submitted.

Because we receive payment from so many sources, **you must submit proof that you made the payments** in order to obtain a refund.

- If you have paid the same bill twice, please submit front and back copies of **both cancelled checks**, and/or receipts.
- If payment was made in error, please submit documentation of that fact.

## Proof of Payment Can Be:

- Front and back copy of cancelled checks
- Paid stamped receipt
- Copy of a printout received from the company that paid the bill (example: your mortgage statement with escrow information)
- If you have none of the above, fill out an [Affidavit](#) and have it notarized.

Once the Treasurer's Office verifies the overpayment and the party eligible for the refund, a voucher is prepared and forwarded to the Montgomery County Auditor who issues a refund check. Due to the high volume of refund requests, please note that it may take 30-45 days before you receive a check. If you prefer, we can credit future tax charges rather than send you a refund. Please indicate your wishes on the [Application for Refund](#) and we will apply the credit to your next tax bill.

## Instructions for Submission:

- 1) Fill out the [Application for Refund](#)
- 2) Gather your proof of payment. If necessary, substitute a notarized [Affidavit](#).
- 3) Send your information by mail to:

Ms. Ella Bolling, Taxpayer Service Supervisor  
Montgomery County Treasurer's Office  
451 West Third St.  
Dayton, OH 45422-0475

or fax it to: (937) 496-7652. If you have any questions, please contact Ms. Bolling at (937) 225-4010 x107.



**Application for Refund of  
Real Estate Tax Overpayment**

I, \_\_\_\_\_, request a refund for an overpayment of  
(Print Full Name)  
real estate taxes for the \_\_\_\_\_ half of \_\_\_\_\_ taxes, on the property bearing the parcel  
(First or Second) (Tax Year)  
number \_\_\_\_\_, in the amount of \$\_\_\_\_\_.

I have included my proof of payment, or if not available, I have included a notarized affidavit.

\_\_\_\_\_  
Full Signature

\_\_\_\_\_  
Date

**Please choose one of the following:**

Apply overpayment to future taxes.

Send a refund check to:      Name:

Address:

Phone:

Please forward this application, and **either** proof of payment or a notarized affidavit, by fax to (937) 496-7652, or by mail to:

Ms. Ella Bolling, Taxpayer Service Supervisor  
Montgomery County Treasurer's Office  
451 West Third St.  
Dayton, OH 45422-0475

------(For Office Use Only- Below)-----

DATE RECEIVED: \_\_\_\_\_

RECEIVED BY: \_\_\_\_\_  
Ella L. Bolling  
Supervisor, Taxpayer Services



**HUGH QUILL**

Montgomery County Treasurer  
451 West Third Street  
Dayton, OH 45422-0475  
(937) 225-4010

**AFFIDAVIT**

I, \_\_\_\_\_, having been duly cautioned, hereby depose and say  
(Print Full Name)

that I have relinquished my paid property tax receipt or cancelled check for the \_\_\_\_\_ half  
(First or Second)

of \_\_\_\_\_ taxes on the property bearing the parcel number \_\_\_\_\_,  
(Tax Year)

for the purpose of obtaining a refund of an overpayment of these taxes, amounting to \$ \_\_\_\_\_;

and I further state that I am legally entitled to this refund.

I hereby assume total responsibility for any and all future claims on this money, which may  
come from any other interested party.

\_\_\_\_\_  
Full Signature

\_\_\_\_\_  
Date

**This affidavit must be notarized.**

------(For Office Use Only- Below)-----

DATE RECEIVED: \_\_\_\_\_

RECEIVED BY: \_\_\_\_\_

Ella L. Bolling  
Supervisor, Taxpayer Services