



City of Somerville, Massachusetts
Finance Department, Treasury Division
Katjana Ballantyne – Mayor

REFUND POLICY

Real Estate Taxes

It is City policy not to issue refund checks for current Fiscal Year credit balances because all tax bills for the current Fiscal Year have not yet been issued. If you made an overpayment on one quarter, the overpayment will be credited towards the next quarter's bill. Credit balances do not automatically move from one Fiscal Year to the next. The Fiscal Year begins on July 1st and ends on June 30th.

A refund check may be issued to a taxpayer who has a credit balance on an account, provided that the taxpayer supplies the City with the proper documentation confirming payment, and provided there are no other outstanding taxes or water bills due and payable to the City from any other year or on other property owned by the taxpayer. It is important to **provide check copies, both front and back**, to ensure that payments made to your account were made by you, or made on your behalf by a bank or mortgage company. To guard against mistakes made by mortgage companies and banks applying payments to the wrong accounts, City policy requires check copy review to ensure refunds (or transfers) are issued to the party that made payment.

If the credit was caused by an overpayment:

A signed, written request for a refund must be accompanied by copies of canceled checks, both front and back, for the fiscal year in which the credit exists. If your taxes are paid by a mortgage company or bank, obtain a copy of their canceled check(s) along with the disbursement sheets that accompany the check(s). If you paid by cash, receipt copies must be provided. If the property has recently been purchased or refinanced, please also include a copy of the Closing Settlement Statement, which lists the details of the taxes paid at the closing. Your letter of request must include your name, the property address, the Parcel ID number and your signature. Please also provide a current mailing address and telephone number. Forward your letter of request and all check copies (front and back), disbursement sheets if applicable, and/or cash payment receipt(s) to: City of Somerville, Attn: Treasury Refunds, 93 Highland Avenue, Somerville, MA 02143. Consider hand delivering the original cash receipt to our office instead of risking it being lost in the mail.

If the credit was caused by an abatement:

The refund will automatically be issued unless the property has changed hands during the fiscal year. The refund will usually be refunded to the record owner as of January 1 as it appears on the tax bill. If the property has been sold during the fiscal year, the date of transfer (deed) and careful review of the information on your Closing Settlement Statement will determine who is eligible for any credit balance.

Motor Vehicle Excise Taxes

A refund will issue automatically to the address on the excise tax bill if there is a credit balance due to an abatement or overpayment.

Water Bills Credits

A credit balance will be applied to the next water bill. If selling, a final water reading should be obtained from Water Department and given to closing counsel so credit is received at closing. If the credit was created by an overpayment or adjustment, and the credit amount will not be used up within the next two billing cycles, a check copy, both front and back must accompany your written and signed request. If the credit was caused by an abatement, a signed letter of request will suffice. Please forward your signed written request to the City of Somerville, Attn: Treasury Refunds, 93 Highland Avenue, Somerville, MA 02143.