CITY OF STOUGHTON
FINANCE DEPARTMENT
207 S Forrest St, Stoughton, WI. 53589

(608) 873-6677 www.ci.stoughton.wi.us

Date: February 20, 2018

To: Finance Committee

From: Ryan Wiesen
Assistant Director of Finance

Subject: Recovery of Unlawful Tax Request – Recommend Acceptance

The City of Stoughton received a request under WI. S.S. 74.35 Recovery of Unlawful Tax from Ryan Tax Compliance (Ryan Tax) on behalf of Aldi, Inc. to refund property taxes of $1,543.90.

Ryan Tax claims the property is exempt property. The city's contracted assessor Accurate Appraisal has confirmed that the property is exempt. Aldi included the exempt property on its original return but did not file an amended return in a timely manner before the Board of Review concluded for 2019. It is important to note that no errors were made by Accurate Appraisal or city staff.

The claim complies with WI SS 74.35 and that the statue obligates the city to refund the taxes. Therefore, it is my recommendation to approve the claim in the amount of $1,543.90 as requested and confirmed. The refund can be charged back to various taxing districts in a future tax year.

Ryan
Innovative Solutions to Taxing Problems.

Williams Tower
2800 Post Oak Boulevard
Suite 3700
Houston, TX 77056
Tel. 713.629.0090
Fax 713.629.0227

www.ryan.com

January 30, 2020

STOUGHTON Clerk
207 S. Forrest Street
Stoughton, WI 53589

To: STOUGHTON Clerk
From: Matt Arroyos
Subject: Aldi, Inc. (Wisconsin) Tax Year 2019 Recovery of Unlawful Taxes – 74.35 Wis Stats
Parcel Account: 58-39781

To Whom It May Concern,

An amended Statement of Personal Property for tax year 2019 was mailed to the Assessor's Office on June 5th of last year on behalf of our client. The amended statement was filed to exclude exempt Machinery & Equipment and Computer assets that were previously reported on the initial statement filed with the Assessor's Office. However, the Assessor's office did not accept the amended statement. This claim is being filed with your office due to exempt property by law being taxed, Wisconsin Statute 74.33(1)(c). The amount of the claim being seek is $1,543.90

We respectfully request this claim be accepted with the tax associated to the exempt Machinery & Equipment and Computer Assets be refund to our client.

Enclosed you will find copies of the both initial statement and amended statement, along with the cover letter mailed with the amended statement.

If there are any questions regarding this claim, please contact us at 866-866-4186 or via email at PTSCompliance@ryan.com.

Thank you for your assistance in this matter.

Sincerely,

Matt Arroyos
Senior Associate Consultant
Ryan Tax Compliance Services, LLC

Aldi's Personal Property Tax Refund Request

Original Assessment	$ 473,500.00
Revised Assessment	$ 399,300.00
Change in Assessment	$ (74,200.00)
2019 Tax Rate	0.021357263
2019 Taxes Original Assessment	10,112.66
2019 Taxes Revised Assessment	8,527.96
Refund Due	1,584.70