

New York State Department of Taxation and Finance

# Real Estate Transfer Tax Claim for Refund

For office use only

Name of claimant		Name of representative or person to contact Telephone number			
0-1-1-1			poroun to contact	( )	
Social security number	Employer identification (	number	Firm name, if applicable		
Address of claimant			Address of person to contact		
City, village or post office	State	ZiP code	City, village or post office		
				State ZIP code	
Location of property conveyed (iii	ist each lot separately; attac	ch additional sh	eets if necessary)	· · · · · · · · · · · · · · · · · · ·	
Address		··		County	
Address				County	
Data of Land					
Date of transfer		,		·	
			1 Amount of tax paid by		
Important: If the refund is to be pa	aid ta annanna		claimant/assignor		
other than the person primarily liab	alu to someone Ne for the tay		2 Amount of tax due	2.	
(as explained on the back), please	check this box	_	3 Refund requested		
and see Refund assignment on the	e back		(subtract line 2 from line 1)	3.	
			ed. Attach additional pages if necessary, and		
morigage carmicate, and cermica	won or exemplion from in	e Pavment ot i	od: Attach additional pages if necessary, and m TP-584, Combined Real Estate Transfer To Estimated Personal Income Tax, was filed wit d by the recording officer at the time of paym	de a reconsidir a sella a sella a sella a	
•					
		·			
	·				
		the claimant			
,claimant, certify that the informatio	on contained in this daim i	S True and con	named above, or partner, officer, or other au rect to the best of my knowledge, that no pric nas previously been refunded to the claiman	مناه کمی مصفی سیا مخطب	

# Instructions

#### Who must file this form

Any person(s) claiming a refund of the real estate transfer tax paid pursuant to Article 31 of the Tax Law must file this form within two years from the date of payment.

#### Person to contact

Please note that any person named as the person to contact on this form may be contacted for purposes of obtaining additional information. However, naming a contact person does not constitute granting power of attorney, and we will not disclose information to that person solely because they have been listed as a contact. If you wish a representative to have such authority, you must complete and submit Form POA-1.

### Person primarily liable for tax

# Real estate transfer tax (Form TP-584, Part I, line 6)

The person primarily liable for the payment of the basic tax is the grantor. If the grantor fails to pay or is exempt, the liability shifts to the grantee.

#### Additional tax (Form TP-584, Part II, line 3)

The person primarily liable for the payment of the additional tax is the grantee. If the grantee is exempt, the liability shifts to the grantor.

#### Refund assignment

When a refund is to be paid to someone other than the person primarily liable for the payment of the tax, you must submit an acknowledged assignment or an affidavit executed by the person primarily liable that clearly:

- 1. states the purpose for assigning the refund,
- describes the subject matter of the assignment with such particularity as to render it capable of identification, and
- states the unconditional intent of the person primarily liable to assign the refund.

#### Where to file

Mail your claim to:

NYS TAX DEPARTMENT

TTTB - REAL ESTATE TRANSFER TAX

W A HARRIMAN CAMPUS ALBANY NY 12227

# Private delivery services

If you choose, you may use a private delivery service, instead of the U.S. Postal Service, to file your return and pay tax, or to file a refund claim. However, if, at a later date, you need to establish the date you filed your return or claim, or paid your tax, you cannot use the date recorded by a private delivery service unless you used a delivery service that has been designated by the U.S. Secretary of the Treasury or the Commissioner of Taxation and Finance. (Currently designated delivery services are listed in Publication 55, Designated Private Delivery Services. See Need help? below for information on ordering forms and publications.) If you have used a designated private delivery service and need to establish the date you filed your return, contact that private delivery service for instructions on how to obtain written proof of the date your return was given to the delivery service for delivery.

#### Privacy notification

The Commissioner of Taxation and Finance may collect and maintain personal information pursuant to the New York State Tax Law, including but not limited to, sections 171, 171-a, 287, 308, 429, 475, 505, 697, 1096, 1142, and 1415 of that Law; and may require disclosure of social security numbers pursuant to 42 USC 405(c)(2)(C)(i).

This information will be used to determine and administer tax liabilities and, when authorized by law, for certain tax offset and exchange of tax information programs as well as for any other lawful purpose.

Information concerning quarterly wages paid to employees is provided to certain state agencies for purposes of fraud prevention, support enforcement, evaluation of the effectiveness of certain employment and training programs and other purposes authorized by law.

Failure to provide the required information may subject you to civil or criminal penalties, or both, under the Tax Law.

This information is maintained by the Director of Records Management and Data Entry, NYS Tax Department, W A Harriman Campus, Albany NY 12227; telephone 1 800 225-5829. From areas outside the United States and outside Canada, cali (518) 485-6800.

# Need help?



Internet access: www.nystax.gov (for information, forms, and publications)



Fax-on-demand forms: Forms are

available 24 hours a day, 7 days a week.

1 800 748-3676



Telephone assistance is available from 8:00 A.M. to 5:00 P.M. (eastern time), Monday through Friday.

To order forms and publications:

1 800 462-8100

Mortgage recording tax (MRT) and real estate transfer tax (RETT) information:

1 888 698-2914

From areas outside the U.S. and outside Canada:

(518) 485-6800



#### Hotline for the hearing and speech impaired:

If you have access to a telecommunications device for the deaf (TDD), contact us at 1 800 634-2110. If you do not own a TDD, check with independent living centers or community action programs to find out where machines are available for public use.



Persons with disabilities: In compliance with the Americans with Disabilities Act, we will ensure that our lobbies, offices, meeting rooms, and other facilities are accessible to persons with disabilities. If you have questions about special accommodations for persons with disabilities, please call 1 800 972-1233.

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Audit report		Approval	Audit and Control
Amount allowed		Approved for payment	
Interest start date	Interest	Signature	-
Total refund	<del>.</del>	Title	
Examiner	Date	Date	-