

Mortgage Recording Tax Claim for Refund

For office use only

Name of claimant		Name of person to contact	Telephone number ()
Social security number	Employer identification number	Name of claimant's representative	
Address of claimant (number and street or rural route)		Address of claimant's representative (number and street or rural route)	
City, village or post office	State	ZIP code	City, village or post office
			State
			ZIP code
Name of mortgagor		Name of mortgagee	
Principal indebtedness secured by mortgage	Date tax was paid	County where tax was paid	

If the claimed refund is to be paid to someone other than the mortgagor or the mortgagee, attach an acknowledged assignment or an affidavit and check this box

Give a full explanation below, including all facts on which your claim is based. Continue on back, if necessary, and submit a copy of the recorded mortgage and all other documents necessary to substantiate your claim.

1 Amount of tax paid by claimant	1	
2 Amount of tax due	2	
3 Refund requested (subtract line 2 from line 1)	3	

(continue on the back)

State of New York

County of

....., being duly sworn deposes and says:

I am the claimant identified above in this mortgage recording tax claim for refund, and I have read the foregoing claim and all accompanying statements and documents, and know their contents. To my own knowledge, this claim is true in all respects.

Signature (print name below signature)

Sworn to before me this

..... day of, 19.....

Notary Public

State of New York

County of

....., being duly sworn deposes and says:

I reside at....., and I am a/the.....of....., the partnership or corporation described in the foregoing mortgage recording tax claim for refund, and I have read the foregoing claim and all accompanying statements and documents, and know their contents. To my own knowledge, this claim is true in all respects.

Signature (print name below signature)

Sworn to before me this

..... day of....., 19.....

Notary Public

Instructions

When to file

An application for refund of the mortgage recording tax paid pursuant to Article 11 of the Tax Law must be filed on Form MT-15.1 within two years of the date that the erroneous payment of tax was received by the recording officer.

If, however, a refund is claimed because of the mortgagor's exercise of the statutory right of rescission, Form MT-15.1 must be filed within the later of the following: two years from the time of payment of the tax or one year from the date the mortgage was discharged.

Where to file

Send your application for refund of the mortgage recording tax to: NYS Tax Department, TTTB-Mortgage Tax, P O Box 5045, Albany, NY 12205-5045.

Privacy Notification — The right of the Commissioner of Taxation and Finance and the Department of Taxation and Finance to collect and maintain personal information, including mandatory disclosure of social security numbers in the manner required by tax regulations, instructions and forms, is found in Articles 8, 11, 31 and 31-B of the Tax Law and 42 USC 405(c)(2)(C)(i).

The Tax Department will use this information primarily to determine and administer the mortgage recording and real estate transfer taxes, and the tax on gains derived from certain real property transfers, and for any other purpose authorized by law.

Failure to provide the required information may result in civil or criminal penalties, or both, under the Tax Law; and, in the case of the mortgage recording tax, failure to secure a refund of all or a portion of that tax.

This information will be maintained by the Director of the Data Management Services Bureau, NYS Tax Department, Building 8 Room 905, W A Harriman Campus, Albany NY 12227; telephone (from New York State only) 1 800 CALL TAX (1 800 225-5829); from areas outside New York State call (518) 438-8581.