



**TAX ABATEMENT SUB-COMMITTEE
IN CARE OF THE OFFICE OF THE ASSESSOR**

City of Burlington, Vermont

City Hall, Room 17, 149 Church Street, Burlington, VT 05401

WEBSITE: www.burlingtonvt.gov/assessor

Voice (802) 865-7114

Fax (802) 865-7116

12/26/2013

Helmut W. Schumann Trust Schumann
Karin Schumann
1 Surf Road
Burlington, VT 05401

RE: The Committee of the Board of Tax Abatement will make the following recommendation to the full Board of Tax Abatement regarding your request for abatement of penalties, interest and / or taxes.

PARCEL ID: 031-3-008-000

LOCATION: 1 Surf Road

AMOUNT REQUESTED: \$470.48

COMMITTEE HEARING DATE: December 4, 2013

AMOUNT RECOMMENDED FOR ABATEMENT: \$0

COMMITTEE'S RECOMMENDATION: Hartnett motion to deny request. Mason second the denial. Motion was unanimous.

MOTION MADE: Deny the request. The interest is legal, collectable and just.

COMMITTEE'S REASONS: Committee recommends to deny the request due to the following; deadlines are in the VT Tax Return booklet, State made outreach efforts regarding the process, penalty of 3% is not overly burdensome and this is consistent with past BTA decisions.

Dear Schumann,

The Board of Tax Abatement will make a final decision on your request for tax abatement on **Monday, January 13, 2014**. The Board looks to the committee's recommendation and reasoning for guidance. You have the right to testify before the Board of Tax Abatement. The hearing will be held at **Contois Auditorium in Burlington City Hall**, during the City Council meeting.

The City Council meeting begins at 7:00 P.M.

If you are planning on attending this meeting, please contact Lori Olberg at 802-865-7136.

Sincerely,

Kenneth Nosek, Associate Assessor
For the Tax Abatement Committee

TAX ABATEMENT REQUEST FORM

Please submit one form per property tax abatement request

Additional copies of this form can be found at www.burlingtonvt.gov/CT/PropertyTax/Abatement

Submit to: Attention: Lori, Burlington City Hall, 2nd Floor—Room 20, 149 Church Street, Burlington, VT 05401

Date of this Request: August 28, 2013

Name, Property Owner on Grand List: Helmut W. Schumann Trust

Name, Applicant: Karin Schumann, life estate holder

(Describe the relationship of applicant to listed owner if the applicant is not the listed owner)

New Owner, Purchase Date: N/A

Executor/Administrator of Estate: N/A

Mailing Address: 1 Surf Road

City, State, Zip code: Burlington, VT 05408

Applicant's Email and Phone #: KRSchumann@aol.com/802-862-1677

Location of Property: 1 Surf Road, Burlington, VT 05408

Parcel ID Number (000-0-000-000): 031-3-008.000 or,

Account Number (PPP000000): _____ business personal property
(Can be found on the tax bill or property record card)

Dollar amount you are requesting abated: \$ 470.48

Circle abatement type requested: taxes penalties interest prior year delinquency other

Briefly describe your abatement request. You may submit a letter with more details of your request.

Abatement request relates solely to penalty for late filed homestead declaration. In prior year, declaration has always been timely filed. The requirement was dropped in 2011 and re-instated for 2012. It has always been part of the income tax preparation program but deleted for 2011 and not automatically again included for 2012. This caused the late filing. I am requesting that you please consider abating the penalty.

Thank you for reviewing this issue.

Signature Karin Schumann Date 8/29/13

Space below is saved for Board notes:	Date received:
<u>Filed Homestead on 7-19-2013</u> <u>Deadline 4-15-2013</u>	

Vermont On-line ACKNOWLEDGEMENT



Congratulations! You have successfully filed your Vermont Homestead Declaration online. Your Confirmation number is 130719-27.

Date: 07/19/2013

School District Code: 035

Name: Karin R Schumann

Legal Residence: BURLINGTON, VT

Physical Location of Homestead: 1 Surf Road

SPAN Number: 114-035-13197

Homeowner's Date of Birth: 06/08/1935

% Business Use of Dwelling: 0.00 %

% Rental Use of Dwelling: 0.00 %

Not including the dwelling, are improvements or other buildings located on your parcel used for business or rented? No

Special Situations

Grantor and sole beneficiary of a Revocable Trust that owns the property? No
Life Estate owner of the property? ~~No~~ Yes
Owner of homestead property that crosses town boundaries? No
Homestead on farm property? No

Signature

Under penalties of perjury, I have examined the above information and, to the best of my knowledge and belief, it is true, correct, and complete. I further declare I am a Vermont resident and the above homestead is my principal dwelling.

NOTE:

After January, 2013 you will be able to verify receipt of your filing by visiting our website at <http://tax.vermont.gov> or by calling the Taxpayer information line 1-866-828-2865 (toll free within Vermont), (802) 828-2865 (local). Please allow 5 business days for processing before verifying status.

Thank you for using the Department's online filing system!

If you would like to make any comments about this service, please go to our online survey page at <http://www.vermont.gov/survey.html>

RECEIVED
SEP -3 A 11:29
BURLINGTON CLERK
REASONS OFFICE

Mrs. Karin R. Schumann
1 Surf Rd
Burlington, VT 05408

RECEIVED

SEP 03 2013

BURLINGTON
TREASURER'S OFFICE

RECEIVED

SEP 03 2013

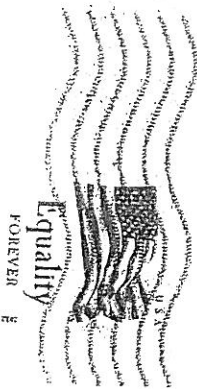
CITY OF BURLINGTON, VERMONT
ASSESSORS OFFICE

0540148460

Burlington City Hall
attn: John - 2nd Floor, Room 20
149 Church St.

Burlington VT 05401

BURLINGTON VT 054
30 AUG 2013 PM 1 L



PAYABLE TO:
MAIL TO:

CITY OF BURLINGTON

149 CHURCH STREET
BURLINGTON VERMONT 05401

802 - 865 - 7000

Location: 1 SURF RD

This is the only bill you will
receive. Please forward to new
owner if property is sold.

TAX BILL

PARCEL ID	BILL DATE	TAX YEAR
031-3-008.000	07/30/2013	2013-2014

OWNER

SCHUMANN HELMUT W TR
1 SURF ROAD
BURLINGTON VT 05408

HOUSESITE TAX INFORMATION

SPAN # 114-035-13197	SCL CODE: 035
TOTAL PARCEL ACRES	0.52
HOUSESITE VALUE	1,027,900
HOUSESITE EDUCATION TAX	15,682.67
HOUSESITE MUNICIPAL TAX	7,795.57
HOUSESITE TOTAL TAX	23,478.24

RETAIN FOR INCOME TAX PURPOSES

ASSESSED VALUE	HOMESTEAD	NON RESIDENTIAL
REAL 1,027,900	1,027,900	
TOTAL TAXABLE VALUE 1,027,900	1,027,900	
GRAND LIST VALUES 10,279.00	10,279.00	

For more information about how education
tax rates are determined, go online to:
www.state.vt.us/tax/pvredtaxrates.shtml

TAX RATE NAME	TAX RATE	GRANDLIST	TAXES
MUNICIPAL	0.7584	x10,279.00=	7,795.57
HOMESTEAD EDUCATION	1.5257	x1,027,900=	15,682.67
PENALTY FOR LATE FILED HOMESTEAD DECLARATION	.0300	x15,682.67=	470.48

QUESTIONS ABOUT YOUR STATE PAYMENT
(PROPERTY TAX ADJUSTMENT) OR HOMESTEAD
DECLARATION SHOULD BE DIRECTED
TO THE STATE OF VERMONT TAX DEPT.
AT 866-628-2865 (TOLL FREE IN STATE)
OR 802-628-2865 (LOCAL OR OUT
OF STATE).

Revised Bill

1ST PAYMENT	2ND PAYMENT	3RD PAYMENT	4TH PAYMENT	TOTAL TAX
06/12/2013	11/12/2013	03/12/2014	06/12/2014	23,948.72
5987.18	5987.18	5987.18	5987.18	0.00
NET TAX DUE				23948.72

DETACH THE STUB BELOW AND RETURN WITH YOUR PAYMENT

CITY OF BURLINGTON
TAX YEAR 2013-2014

CITY OF BURLINGTON
TAX YEAR 2013-2014

CITY OF BURLINGTON
TAX YEAR 2013-2014

CITY OF BURLINGTON
TAX YEAR 2013-2014

1ST PAYMENT DUE	
08/12/2013	
OWNER NAME	
SCHUMANN HELMUT W TR	
PARCEL ID	
031-3-008.000	
AMOUNT DUE	5,987.18
AMOUNT PAID	Revised Bill

2ND PAYMENT DUE	
11/12/2013	
OWNER NAME	
SCHUMANN HELMUT W TR	
PARCEL ID	
031-3-008.000	
AMOUNT DUE	5,987.18
AMOUNT PAID	Revised Bill

3RD PAYMENT DUE	
03/12/2014	
OWNER NAME	
SCHUMANN HELMUT W TR	
PARCEL ID	
031-3-008.000	
AMOUNT DUE	5,987.18
AMOUNT PAID	Revised Bill

4TH PAYMENT DUE	
06/12/2014	
OWNER NAME	
SCHUMANN HELMUT W TR	
PARCEL ID	
031-3-008.000	
AMOUNT DUE	5,987.18
AMOUNT PAID	Revised Bill

PAYABLE TO:
MAIL TO:

CITY OF BURLINGTON

149 CHURCH STREET
BURLINGTON VERMONT 05401
802 - 865 - 7000

Location: 1 SURF RD

This is the only bill you will
receive. Please forward to new
owner if property is sold.

TAX BILL

PARCEL ID	BILL DATE	TAX YEAR
031-3-008.000	07/01/2013	2013-2014

2608520

OWNER

SCHUMANN HELMUT W TR
1 SURF ROAD
BURLINGTON VT 05408

HOUSEHOLD TAX INFORMATION	
SPAN # 114-035-13197	SCL CODE: 035
TOTAL PARCEL ACRES	0.52
RETAIN FOR INCOME TAX PURPOSES	

ASSESSED VALUE	HOMESTEAD	NON RESIDENTIAL
REAL 1,027,900		1,027,900
TOTAL TAXABLE VALUE 1,027,900		1,027,900
GRAND LIST VALUES 10,279.00		10,279.00

For more information about how education
tax rates are determined, go online to:
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QUESTIONS ABOUT YOUR STATE PAYMENT
(PROPERTY TAX ADJUSTMENT) OR HOMESTEAD
DECLARATION SHOULD BE DIRECTED
TO THE STATE OF VERMONT TAX DEPT.
AT 866-828-2865 (TOLL FREE IN STATE)
OR 802-828-2865 (LOCAL OR OUT
OF STATE).

TAX RATE NAME	TAX RATE	GRANDLIST	TAXES
MUNICIPAL	0.7584	x10,279.00=	7795.59
NON RESIDENTIAL EDUCATION	1.6055	x10,279.00=	16502.93

1ST PAYMENT	2ND PAYMENT	3RD PAYMENT	4TH PAYMENT	TOTAL TAX
08/12/2013	11/12/2013	03/12/2014	06/12/2014	24,298.52
6074.63	6074.63	6074.63	6074.63	0.00
NET TAX DUE				24298.52

DETACH THE STUB BELOW AND RETURN WITH YOUR PAYMENT

CITY OF BURLINGTON
TAX YEAR 2013-2014

CITY OF BURLINGTON
TAX YEAR 2013-2014

CITY OF BURLINGTON
TAX YEAR 2013-2014

CITY OF BURLINGTON
TAX YEAR 2013-2014

1ST PAYMENT DUE	08/12/2013
OWNER NAME	SCHUMANN HELMUT W TR
PARCEL ID	031-3-008.000
AMOUNT DUE	6,074.63
AMOUNT PAID	

2ND PAYMENT DUE	11/12/2013
OWNER NAME	SCHUMANN HELMUT W TR
PARCEL ID	031-3-008.000
AMOUNT DUE	6,074.63
AMOUNT PAID	

3RD PAYMENT DUE	03/12/2014
OWNER NAME	SCHUMANN HELMUT W TR
PARCEL ID	031-3-008.000
AMOUNT DUE	6,074.63
AMOUNT PAID	

4TH PAYMENT DUE	06/12/2014
OWNER NAME	SCHUMANN HELMUT W TR
PARCEL ID	031-3-008.000
AMOUNT DUE	6,074.63
AMOUNT PAID	



113032741



113032742



113032743



113032744

031 3 008
MAP QUAD LOT

1 of 1 RESIDENTIAL
CARD

TOTAL ASSESSED: 1,027,900
131971

BURLINGTON, VT

PROPERTY LOCATION

No.	Alt No.	Direction/Street/City
1		SURF RD, BURLINGTON

OWNERSHIP

Owner 1:	SCHUMANN HELMUT W TR
Owner 2:	
Owner 3:	
Street 1:	1 SURF ROAD
Street 2:	
Town/City:	BURLINGTON
State/Prov:	VT
Postal:	05408

PREVIOUS OWNER

Owner 1:	
Owner 2:	
Street 1:	
Town/City:	
State/Prov:	
Postal:	

NARRATIVE DESCRIPTION

This Parcel contains 22801. SF of land mainly classified as Single Fam with a(n) CONTEMPORARY Building Built about 1980, Having Primarily CLAPBOARD Exterior and ASPHALT SH Roof Cover, with 1 Units, 2 Baths, 0 Hall/Baths, 0 3/4 Baths, 7 Rooms Total, and 4 Bdrms.

OTHER ASSESSMENTS

Code	Description/No.	Amount	Cont. Int.
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IN PROCESS APPRAISAL SUMMARY

Use Code	Building Value	Yard Items	Land Size	Land Value	Total Value	Legal Description	User Acct
R1	308,400	300	22801.000	719,200	1,027,900		
Total Card	308,400	300	0.523	719,200	1,027,900		
Total Parcel	308,400	300	0.523	719,200	1,027,900		
Source:	OverRide	Total Value per SQ Unit / Card:	383.69	Parcel:	383.69		

PREVIOUS ASSESSMENT

Tax Yr	Use	Cat	Bldg Value	Yrd Items	Land Size	Land Value	Total Value	Asses'd Value	Notes	Date
2013	R1	ABST	308,400	300	22,801	719,200	1,027,900	1,027,900	Change of Value Notices	5/3/2013
2013	R1	PREL	308,400	300	22,801	719,200	1,027,900	1,027,900	10/19/2013 tax billing	6/19/2013
2012	R1	ABST	308,400	300	22,801	719,200	1,027,900	1,027,900	10/19/2012 tax billing	5/4/2012
2012	R1	FV	308,400	300	22,801	719,200	1,027,900	1,027,900	10/19/2012 tax billing	9/12/2012
2012	R1	PREL	308,400	300	22,801	719,200	1,027,900	1,027,900	10/19/2012 tax billing	6/20/2012
2011	R1	ABST	308,400	300	22,801	719,200	1,027,900	1,027,900	10/19/2011 tax billing	8/1/2011
2011	R1	FV	308,400	300	22,801	719,200	1,027,900	1,027,900	10/19/2011 tax billing	8/1/2011
2011	R1	PREL	308,400	300	22,801	719,200	1,027,900	1,027,900	10/19/2011 tax billing	6/24/2011

SALES INFORMATION

Grantor	Legal Ref	Type	Date	Sale Price	V	Tst	Verif	Assoc PCL Value	Notes

TAX DISTRICT

Grantor	Legal Ref	Type	Date	Sale Price	V	Tst	Verif	Assoc PCL Value	Notes

BUILDING PERMITS

Date	Number	Descr	Amount	C/O	Last Visit	Fed Code	F- Descr	Comment
4/30/2013	12013	168463 Mechanic	8,420 A					Installation of (2
10/15/2012	2012	160181 Building	5,980 A					Replace windows w/
9/24/2012	113-0347CA	Zoning I	5,980 A					Replacement of thr
8/23/1995	96-27587		8,000 I					M

ACTIVITY INFORMATION

Date	Result	By	Name
2/18/2009	EQUALIZATION	JV	JWICKERY
6/29/2005	INFO HEARING	JV	JWICKERY
3/24/2005	CORRECTION	KN	K NOSEK
12/9/2004	DATA ENTRY	AF	A FRANCIS
8/25/2004	ENTRY & SIG	RK	R KILBOURN

LAND SECTION (First 7 lines only)

Use Code	Description	UUC Fact	No of Units	Depth/ Price/Units	Unit Type	Land Type	LT Factor	Base Value	Unit Price	Adj	Neigh Influ	Neigh Mod	Intl.1	%	Intl.2	%	Intl.3	%	Appraised Value	Alt Class	%	Spec Land	J Code	Fact	Use Value	Notes
R1	Single Fam		22801		Sq Ft	SITE		0	30	1,051.135			Other	-5					719,178						719,200 PART SWAMPY	

Sign: VERIFICATION OF VISIT NOT DATA

Total AC/H: 0.52344

Total SF/SM: 22801.00

Parcel LUC: R1

Prime NB Desc: LAKEFRNT NNE

Total: 719,178 Sp Credit: Total: 719,200

Disclaimer: This Information is believed to be correct but is subject to change and is not warranted. Database: AssessPro

2013



Patriot Properties Inc

USER DEFINED	
RAD: 175	
OLD PID: 191914	
State Dist: 3-01	
CAD: 610	
SPAN: 114-035-1	
Prior Id #3:	
Bus Use 0	
Rental Use: 0	
HSC: 04142008	
ASR Map:	
Fact Dist:	
Reval Dist:	
Year:	
Land Reason:	
Bio Reason:	

