

Request for Refund
Tax Rate Rounding



CITY OF LONE TREE

9220 Kimmer Drive
Suite 100
Lone Tree, CO 80124
Ph: 303-708-1818
Fax: 303-225-4949

I. Taxpayer Information:

Name

Address

City, State and Zip Code

II. Refund Request:

Single Purchase Only:

Date of Purchase: _____ Store Name: _____ Amount of Purchase: _____
(Sub-total on receipt before tax has been charged)

Multiple Purchases from the Same Store:

Store Name: _____

Date of Purchase: _____	Amount of Pre-Tax Purchase: _____	Tax Paid: _____
Date of Purchase: _____	Amount of Pre-Tax Purchase: _____	Tax Paid: _____
Date of Purchase: _____	Amount of Pre-Tax Purchase: _____	Tax Paid: _____
Date of Purchase: _____	Amount of Pre-Tax Purchase: _____	Tax Paid: _____
Date of Purchase: _____	Amount of Pre-Tax Purchase: _____	Tax Paid: _____
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Date of Purchase: _____	Amount of Pre-Tax Purchase: _____	Tax Paid: _____
Date of Purchase: _____	Amount of Pre-Tax Purchase: _____	Tax Paid: _____
Date of Purchase: _____	Amount of Pre-Tax Purchase: _____	Tax Paid: _____

Total of Purchases: _____ Total
Tax Paid: _____

III. Calculation of Refund (Completed by the City):

- 1. Total of Purchase(s): _____
- 2. Tax Rate Charged on Receipt(s): _____ (Listed on receipt or calculated by: Line 3 divided by Line 1)
- 3. Total Tax Paid on Receipt(s): _____
- 4. Correct Tax Rate: _____ (If line 2 = 6.813%, then the correct rate should be 6.8125%;
If line 2 = 6.913%, then the correct rate should be 6.9125%)
- 5. Corrected Tax Due: _____ (Line 1 x Line 4 - Line 3)
- 6. Difference = Amount Refunded _____ (Line 3 - Line 5)

IV. Signature – Before signing this document, read this section carefully.

I confirm that a refund in the form of cash payment in the amount listed above on Line 6, section III has been issued by the City and received by me for overpayment of City sales tax.

Signature

Date

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Instructions:

1. This form is to be used ONLY for taxpayers requesting refunds due to a vendor rounding the City's sales tax rate thus causing an overpayment of City sales tax. In addition, this form is to be used only for refunds up to \$1.00. Any taxpayer with a refund request over \$1.00 must contact the City Auditor, Scott Hall, and will be required to fill out a refund request form and be issued a refund payment via City check.
2. The person requesting the refund, the requestor, should complete sections I and II. The requestor does not have to be a resident of the City to receive a refund. Anyone that has overpaid City sales tax due to the vendor rounding the City sales tax rate is eligible for a refund.
3. Section II, "Amount of Purchase" should be the amount BEFORE sales tax has been charged on the receipt. Because Lone Tree has sales tax rates outside of the Football District (original Lone Tree at 6.8125%) and within the Football District (annexed Lone Tree at 6.9125%) only receipts from the same store can be combined onto one form for calculation of the refund. Refunds for different stores require completion of a separate form.
4. A City representative will complete section III based on the figures supplied by the requestor in section II. Calculations for each line have been listed next to the line item. Calculate total refund due on line 6, section III.
5. Issue the taxpayer a refund from the specified "tax rate rounding refund" fund based on the refund due amount on line 5, section III. This refund money will be held in the drawer alongside the cash box. Cash refunds of up to \$1.00 can be issued to the taxpayer. Any refund over \$1.00 will be issued via City check (please see instructions in line 1 above).
6. The requestor must sign and date the form in section IV. This is considered the requestor's receipt of refund as well as documentation for the City that the refund has been issued. The original form will be kept by the City. Upon request a copy of the form can be supplied to the requestor.