

OFFICE OF THE DODGE COUNTY TREASURER

PO BOX 999, FREMONT NE 68026-0999 PHONE 402/727-2750 FAX 402/727-2753
GAIL J BARGSTADT JUDITH J MAIN
COUNTY TREASURER DEPUTY COUNTY TREASURER

January 9, 2020

Dodge County Board of Supervisors
435 N Park Avenue
Fremont NE 68025

RE: Refund of Inheritance Tax

Please find attached a request for a refund of Inheritance Tax. On January 22, 2019, an "Order to Allow Payment of Tentative Inheritance Tax" was done for the Estate of Betty Lou H. Jelinek. We receipted that payment on January 22, 2019 in the amount of \$117,047.32.

On January 7, 2020, an "Order Re-Determining and Assessing Inheritance Tax – Final Determination" was done. This Re-Determination indicates that Dodge County collected too much and that the Estate is owed a refund of \$1,866.55.

This letter is requesting that the Board approve this refund so that this office may pay the Estate.

Thank you for your consideration.

Respectfully,


Gail J. Bargstadt
Dodge County Treasurer

Attachments

RECEIVED
2020 JAN -9 AM 10:08
DODGE COUNTY, NEBRASKA
FRED WITTMAN, COUNTY CLERK

FILED IN DODGE COUNTY COURT

JAN 07 2020

IN THE COUNTY COURT OF DODGE COUNTY, NEBRASKA

IN THE MATTER OF THE ESTATE OF) CASE NO. PR18-~~55~~ 155
)
) ORDER REDETERMINING AND
) ASSESSING INHERITANCE TAX
BETTY LOU H. JELINEK, Deceased.) FINAL DETERMINATION

Upon consideration of the evidence and the Petition for Redetermination of Inheritance Tax and all supporting documents, if any, filed and incorporated by reference, the Court finds, orders and determines that:

1. Petitioner has previously paid the sum of \$117,047.32 tentative inheritance tax due Dodge County, Nebraska, and, therefore, notice to interested parties is hereby dispensed with pursuant to Nebraska Revised Statutes Section 77-2018.02 (5).
2. The County Attorney for each county in which the property described in the Petition is located has executed and filed with this Court a Waiver of Notice to show cause, or of time and place of hearing, and has entered a Voluntary Appearance on behalf of the County and State of Nebraska.
3. The values set forth in the Petition for Redetermination of Inheritance Tax and the Amended Inheritance Tax Worksheet accurately reflect the total clear market value of the assets listed therein subject to Nebraska Inheritance Tax; and that all deductions, credits, allowances, exemptions and contributions by survivors to jointly owned property claimed therein, if any, are proper and are hereby allowed as per the adjustments pertaining thereto in connection with the estate of the Decedent.
4. Payment of tentative tax, having constituted an overpayment, a refund of said overpayment, is due the following named parties:

<u>Beneficiary</u>	<u>Tax Refund</u>
Terri McIntosh Pazirandeh	\$ 400.07
Laverne D. McIntosh	\$ 400.07
William F. McIntosh	\$ 208.73
Rhonda S. Griess	\$ 400.07
Darlene V. Smith	\$ 457.61
TOTAL	\$1,866.55

//



000441892C05

Gail J Bargstadt

From: Office Main <office@mwisemanlaw.com>
Sent: Wednesday, January 8, 2020 4:29 PM
To: treasurer@dodge.nacone.org
Subject: Refund: Estate of Betty Lou H. Jelinek, PR18-155

Gail,

Please forward the refund for overpayment of inheritance taxes in the Estate of Betty Lou H. Jelinek, in the amount of \$1,866.55, to:

Wiseman Law Offices
92 West 5th Street, Suite A
Fremont, NE 68025

Please issue the check payable to the Estate of Betty Lou H Jelinek.

Thank you,

--Jean Haynes
Assistant to Mike Wiseman

REFUND IS SO ORDERED.

DATED this 7 day of January, 2020.

BY THE COURT:

Lisa K Stover
COUNTY JUDGE
Clerk Magistrate



PREPARED AND SUBMITTED BY:
G. Michael Wiseman, #14573
Wiseman Law Offices
92 West 5th Street, Suite A
Fremont, NE 68025
Telephone: (402) 727-5577
Email: gmw@mwisemanlaw.com

DOD 8-18-18
Mike Wiseman

MISCELLANEOUS RECEIPT
COUNTY TREASURER'S OFFICE
DODGE COUNTY NEBRASKA

No. 19338 *Check*

RECEIVED OF ESTATE OF BETTY LOU H JELINEK January 22, 2019
the sum of One Hundred Seventeen Thousand Forty-Seven Dollars And

117,047.32

Thirty-Two Cents

collected by GAIL
for PD BY-ESTATE OF BETTY LOU H JELINEK; PR #18-155;
DOD 08/18/2018

Credits To:
2700 INHERITANCE TAX 31001 \$117,047.32

Gail J Bargstadt
County Treasurer
GAIL
~~Deputy~~

FILED

2019 JAN 22 PM 2: 34

DODGE COUNTY, NEBRASKA
IN THE COUNTY COURT OF DODGE COUNTY, NEBRASKA
LISA R. STOVER
COUNTY COURT CLERK

IN THE MATTER OF THE ESTATE OF)
)
)
)
)
)
BETTY LOU H. JELINEK, Deceased.)

No. PR18-155

ORDER TO ALLOW PAYMENT OF
TENTATIVE INHERITANCE TAX

This matter came on for hearing on the 22 day of January, 2019, upon Application to Pay Tentative Inheritance Tax and the County Attorney's consent thereto. Upon due consideration of the pleadings, evidence and supporting documents, if any, filed herein and incorporated by reference, the Court finds and determines that:

1. The Decedent died on August 18, 2018.
2. The Decedent was domiciled in the County of Dodge, State of Nebraska.
3. The Application should be granted.

IT IS THEREFORE ORDERED, ADJUDGED AND DECREED that there is payable as a tentative inheritance tax, pursuant to the terms and conditions of Nebraska Revised Statutes Section 77-2018.07, the following:

<u>Beneficiary</u>	<u>Tax Due</u>
Terri McIntosh Pazirandeh	\$22,958.71
Laverne D. McIntosh	\$22,958.71
William F. McIntosh	\$11,045.85
Rhonda S. Griess	\$22,958.71
Darlene V. Smith	\$37,125.34
TOTAL	\$117,047.32

and that the tax is apportioned to the following counties: DODGE

Court costs are due herein in the amount of \$24.00.

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DATED the 22 day of January, 2019.

BY THE COURT:



Lisa K. Stover

COUNTY COURT JUDGE
Clerk Magistrate

PREPARED AND SUBMITTED BY:
G. Michael Wiseman, #14573
Wiseman Law Offices
92 West 5th Street, Suite A
Fremont, NE 68025
Telephone: (402) 727-5577
Email: gmw@mwisemanlaw.com