

Agenda Item # 13
Date 5/20/20

OFFICE OF THE DODGE COUNTY TREASURER

PO BOX 999, FREMONT NE 68026-0999 PHONE 402/727-2750 FAX 402/727-2753

GAIL J BARGSTADT
COUNTY TREASURER

JUDITH J MAIN
DEPUTY COUNTY TREASURER

May 13, 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 November 20, 2019, an "Order Determining and Assessing Tentative Inheritance Tax" was done for the Estate of Betty Lou Klein Gutekunst. We receipted that payment on November 22, 2019 in the amount of \$2,938.14.

On May 11, 2020, an "Amended Order Determining and Assessing Final Inheritance Tax" was done. This Amended Determination indicates that Dodge County collected too much and that the Estate is owed a refund of \$35.49.

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

SIDNERLAW

– since 1897 –

THOMAS B. THOMSEN
BRADLEY D. HOLTORF
S. NICHOLAS BOGGY
BRADLEY E. NICK
SHANE J. PLACEK
LINSEY MORAN BRYANT

MILITARY COLONIAL BUILDING
340 E. MILITARY AVENUE, SUITE 1
FREMONT, NEBRASKA 68025-5097

PHONE 402-721-7111
FAX 402-721-9120

WILLIAM J. COURTRIGHT, 1862-1950
S. SIDNER, 1875-1944
EARL J. LEE, 1888-1963
H.A. GUNDERSON, 1889-1969
ARTHUR C. SIDNER, 1900-1975
GEORGE E. SVOBODA, 1917-2011
NEIL W. SCHILKE, Retired

MEMO

TO: Dodge County Treasurer

FROM: Tom Thomsen

DATE: May 11, 2020

RE: Estate of Betty Lou Klein Gutekunst

I am attaching an Amended Order Determining and Assessing Final Inheritance Tax in this estate.

Tentative Inheritance Tax was determined and paid in the amount of \$2,983.14.

You refunded to Ralph Gutekunst the sum of \$45.00.

Final Inheritance Tax was determined in the amount of \$2,902.65 which now results in a overpayment of \$35.49.

Please consider this memo a claim for \$35.49 to be made payable to the Estate of Betty Lou Klein Gutekunst.

A copy of the Order Determining and Assessing Final Inheritance Tax is attached.

Tom Thomsen
TBT/lkm

FILED

IN THE COUNTY COURT OF DODGE COUNTY, NEBRASKA

IN THE MATTER OF THE ESTATE OF BETTY LOU KLEIN GUTEKUNST, Deceased. Case No. PR 19-207

OF

DODGE COUNTY, NEBRASKA
LISA K. SIDVER
COUNTY COURT CLERK

AMENDED ORDER
DETERMINING AND ASSESSING
FINAL INHERITANCE TAX

BETTY LOU KLEIN GUTEKUNST,
Deceased.

Upon consideration of the evidence and computation of inheritance tax liability as shown on the Inheritance Tax Worksheet (Final Determination) filed herein, and incorporated herein by reference,

THE COURT HEREBY ORDERS, DETERMINES AND ASSESSES Final Inheritance Tax herein as follows:

There is due and payable by reason of the death of Betty Lou (Blue) Klein Gutekunst tentative final tax in the total amount of \$2,902.65 which shall be paid to the Dodge County Treasurer of Dodge County, Nebraska. The Dodge County Court on November 20, 2019, incorrectly assessed the amount of Inheritance Tax in the amount of \$2,938.14 when the tax should have been \$2,983.14. Tentative Inheritance Tax was paid to the Dodge County Treasurer on about November 21, 2019, in the amount of \$2,983.14, the correct amount of tax. The Dodge County Treasurer refunded the sum of \$45.00 to the Estate of Betty Lou Klein Gutekunst. Additional refund is due to the Estate of Betty Lou Klein Gutekunst in the amount of 35.49

The lien for inheritance tax arising by reason of the death of Betty Lou (Blue) Klein Gutekunst is extinguished on the following described real estate:

Lots 1 and 2 in Block 3, of the Original Town of North Bend, now City of North Bend as surveyed, platted and recorded in Dodge County, Nebraska.

Dated this 11 day of May, 2020.

BY THE COURT:



Lisa K. Sidver
County Judge
Clerk Magistrate



FILED

IN THE COUNTY COURT OF DODGE COUNTY, NEBRASKA

IN THE MATTER OF THE ESTATE

2019 NOV 20 PM 2:37
Case No. PR 19-207

OF

DODGE COUNTY NEBRASKA
LISA K. STOVER
COUNTY COURT CLERK
ORDER DETERMINING AND
ASSESSING TENTATIVE
INHERITANCE TAX

BETTY LOU KLEIN GUTEKUNST,
Deceased.

INHERITANCE TAX

Upon consideration of the evidence and computation of inheritance tax liability as shown on the Inheritance Tax Worksheet filed herein, and incorporated herein by reference,

THE COURT HEREBY ORDERS, DETERMINES AND ASSESSES Inheritance Tax herein as follows:

There is due and payable by reason of the death of Betty Lou (Blue) Klein Gutekunst tentative inheritance tax in the total amount of \$2,938.14 which shall be paid to the Dodge County Treasurer of Dodge County, Nebraska.

Said amount of inheritance tax so found due will draw interest at the legal rate one year from the date of death of said Decedent, if said tax is not paid on or before one year from the date of death of said Decedent, which date of death was November 29, 2018.

Upon payment of the inheritance tax so found due plus interest, if any, the lien for inheritance tax arising by reason of the death of Betty Lou (Blue) Klein Gutekunst, shall be extinguished on the following described real estate:

Lots 1 and 2 in Block 3, of the Original Town of North Bend, now City of North Bend as surveyed, platted and recorded in Dodge County, Nebraska.

Dated this 20 day of November, 2019.

BY THE COURT:

Lisa K. Stover
County Judge
Christa Magistrale



Prepared and submitted by:
Thomas B. Thomsen, #14195
SIDNERLAW
340 E. Military Ave., Suite 1
Fremont, NE 68025-5097
(402) 721-7111



000436122C05

MISCELLANEOUS RECEIPT
COUNTY TREASURER'S OFFICE
DODGE COUNTY NEBRASKA

No. 20200

ck

November 22, 2019

2,938.14

RECEIVED OF ESTATE OF BETTY LOU KLEIN GUTEKUNST
the sum of Two Thousand Nine Hundred Thirty-Eight Dollars And Fourteen Cents

collected by JUDI
for PD BY-RALPH GUTEKUNST PR19-207 DOD 11/29/2018

Credits To:
2700 INHERITANCE TAX 31001 \$2,938.14 0000 0.00G+

[Signature]
2 983.14 +
2 938.14 -

0002
Refund 19261
45.00G+

Refunded

Gail J Bargstadt
County Treasurer
JUDI
Deputy

GAIL J. BARGSTADT
DODGE COUNTY TREASURER
P.O. BOX 999
FREMONT, NE 68026-0999

 First National Bank
Fremont, NE
76-4/1049

019261

11/22/2019

PAY TO THE
ORDER OF RALPH GUTEKUNST

\$ **45.00

Forty-Five Only*****

DOLLARS

330 W 10TH ST
NORTH BEND, NE 68649

GAIL J. BARGSTADT TREASURER
DEPUTY

VOID AFTER 60 DAYS

MEMO

MISC RECT #20200 OVERPMT-INHER T

AUTHORIZED SIGNATURE
NON-NEGOTIABLE

⑈019261⑈ ⑆104900048⑆ 40 126 9⑈

ATTN: Leah

From Judi @ Dodge County Treasurer

Gail J Bargstadt

From: Wragge, Cindy <cwragge@fnni.com>
Sent: Wednesday, May 6, 2020 2:08 PM
To: 'Gail J Bargstadt'
Subject: check image - transposition

Hi Gail—it paid for \$2,983.14:

76-11-1040 2454

RALPH GUTEKUNST
330 W 10TH ST
NORTH BEND, NE 68649

21 Nov 2019

Pay To The Order Of Dodge County Treasurer \$ 2983.14
Two Thousand Nine Hundred Eighty Three ¹⁴/₁₀₀ Dollars

FIRST STATE BANK & TRUST CO.
FREMONT, NE 68026-0549

For MISC 20200

[Signature]

SAFETY CHECK

Cindy Wragge
Branch Manager
Fremont Main
fnbo
152 E 6th Street | PO Box 228 | Fremont | NE | 68026
Direct 402.753.2245
cwragge@fnni.com | fnbo.com
NMMLS ID 1696513

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