



CITY OF WAUWATOSA
BUDGET AND FINANCE COMMITTEE
MINUTES • JANUARY 7, 2014

Regular Meeting**Committee Room #2****7:00 PM**

7725 West North Avenue, Wauwatosa, WI 53213

Attendee Name	Title	Status	Arrived
Peter Donegan	Alderman	Excused	
Craig Wilson	Alderman	Present	
John Dubinski	Alderman	Present	
Tim Hanson	Alderman	Present	7:03 PM
Jill Organ	Alderwoman	Present	
Joel Tilleson	Alderman	Present	
Brian Ewerdt	Alderman	Present	
Donald Birschel	Alderman	Present	
John Ruggini	Finance Director	Present	
James Archambo	City Administrator	Present	
Robert Lenski	Deputy Assessor	Present	
Rhett Tuff	Appraiser	Present	
Alan Kesner	City Attorney	Present	

BUDGET AND FINANCE COMMITTEE ITEMS

1. Memo from the Finance Director requesting rescission of 2013 property taxes for six properties

The Committee reviewed a memo from the Finance Director requesting rescission of 2013 property taxes for six properties.

Mr. Ruggini explained that the assessed values of four real estate properties were not updated in the computer system after the Assessor's office received additional information provided by property owners' legal representatives during the 2013 Open Book period. For this reason, the 2013 taxes were calculated incorrectly. In addition, the City was notified by two businesses that they had ceased operations in Wauwatosa prior to January 1, 2013, but had still received a personal property tax bill based on a 2013 assessment. The additional taxes levied on the incorrect assessments should be rescinded and this can only be done through Council action.

In total, Mr. Ruggini recommended that \$51,837.04 be rescinded and refunded to the property owners. The rescinded amount is eligible for chargeback to the other taxing jurisdictions and is also exempt from levy limits. The City's portion, estimated at \$15,888, would be paid for out of contingency and the remainder would be charged back.

Mr. Lenski explained that the four real estate properties addressed by this item were represented by the same legal representative. The pertinent documentation was submitted at the very end of the extremely busy Open Book period in 2013. The owners of the two personal properties did not report their business closure until December 20, 2013.

Responding to a question, Mr. Ruggini agreed that timing was the major issue in this instance. The tax rate was set before these discrepancies were found.

Moved by Ald. Wilson, seconded by Ald. Dubinski
to recommend approval to rescind a portion of the 2013 taxes for six
properties, totaling \$51, 836.04 - Ayes: 7

RESULT:	RECOMMENDED FOR APPROVAL [UNANIMOUS]
AYES:	Wilson, Dubinski, Hanson, Organ, Tilleson, Ewerdt, Birschel
EXCUSED:	Donegan

2. Vouchers

Moved by Ald. Hanson, seconded by Ald. Organ
that each and every voucher be allowed and paid - Ayes: 7

RESULT:	APPROVED [UNANIMOUS]
AYES:	Wilson, Dubinski, Hanson, Organ, Tilleson, Ewerdt, Birschel
EXCUSED:	Donegan

The meeting adjourned at 7:08 p.m.

Carla A. Ledesma, CMC, City Clerk