



TAXATION & REVENUE

City of Monroe, Louisiana
MAYOR – COUNCIL GOVERNMENT

Claim for Refund of Taxes Paid

Name of taxpayer _____

Mailing Address:

Address _____

City _____ State _____ Zip _____

Local Sales Tax Account Number _____

Period(s) of overpayment _____

Contact Person:

Name _____

Email Address _____

Telephone _____ Fax _____

Total remitted for the period \$ _____

Amount claimed to be due as amended \$ _____

Difference (refund requested) \$ _____

This refund is claimed for the following reasons:

All documentation evidencing your refund claim must accompany the request or the claim will be denied. For example: original invoice, credit invoice, original tax return, and proof of payment. See attached Refund Policy for additional information.

For bad debt write-offs, please supply the state's approval letter.

Signature of Taxpayer: _____ Date Prepared: _____

FOR OFFICE USE ONLY:

Total Approved for Payment \$ _____

Date _____ Approved By _____



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Refund Policy

The City of Monroe Taxation & Revenue Division has established the following policy on processing any refund claims received by this office.

All claims for refund can either be on the *Claim for Refund of Taxes Paid* form or by an official letter. If submitting a refund claim by an official letter, all information on the *Claim for Refund of Taxes Paid* must be included on your letter.

1) Transactions in which the dealer collected taxes from a customer when no tax was due:

Before local sales tax can be refunded to the dealer, the dealer must provide documentation that the tax has been refunded to the customer(s) that paid the tax ***with the refund claim.***

All documentation that supports the refund request must accompany the claim for refund, including but not limited to copies of customers invoices. The dealer should also provide a detailed schedule of customers showing the amount of local sales taxes refunded directly to each customer.

2) All other refund requests – Clerical or mathematical errors on returns, taxes remitted to an incorrect parish, etc.:

The dealer must provide ***all documentation evidencing their claim for refund with the claim for refund.***

Depending on the size of the refund claim and the documentation required to evidence the claim, the dealer may submit the claim electronically to the City of Monroe Taxation & Revenue Division. However, it must be submitted timely to be considered filed prior to prescription running on the claim.

Any claim for refund submitted to the City of Monroe Taxation & Revenue Division without supporting evidence of the amount due will be **DENIED**.