

Claiming Surplus Funds

Previous owner

To claim surplus funds you must submit the following prior to the expiration of the claim period:

- Notarized Affidavit of Claim
 - Must reference the tax deed number
 - Must state your interest in the property and/or surplus funds
 - Must be properly executed with the date, complete notarization and two witnesses
 - Must include your current mailing address
- Legible copy of a government issued photo identification
 - Must be a valid Driver License, ID card, or Passport that shows address and DOB
- Contact information with which you may be reached for questions or additional information regarding your claim if necessary
 - Email, phone number(s) and/or different mailing address
- Other information as needed

Please remember to reference the tax deed number on all claim documents, id's, correspondence and emails submitted to our office.

Heir/Beneficiary/Executor of the Estate of the previous owner

To claim surplus funds you must submit the following prior to the expiration of the claim period:

- Death Certificate of previous owner
 - Must be a certified copy or an original
- Probate documentation for the estate
 - Must reference the tax deed
 - Must be filed in Florida (preferably Lee County where property is located)
 - Must list all heirs/beneficiaries and their entitlement
 - Must be a certified copy Order from the court
 - If case is not finalized – must be a certified copy of the Petition
- Notarized Affidavit of Claim

- Must reference the tax deed number
- Must state your interest in the property and/or surplus funds
- Must be properly executed with the date, complete notarization and two witnesses
- Must include your current mailing address
- Legible copy of a government issued photo identification
 - Must be a valid Driver License, ID card, or Passport that shows address and DOB
- Contact information with which you may be reached for questions or additional information regarding your claim if necessary
 - Email, phone number(s) and/or different mailing address
- Other information as needed

Please remember to reference the tax deed number on all claim documents, id's, correspondence and emails submitted to our office.

Lien Holder

To claim surplus funds you must submit the following prior to the expiration of the claim period:

- Copy of recorded lien
- Notarized Affidavit of Claim
 - Must reference the tax deed number
 - Must state your interest in the property and/or surplus funds
 - Must indicate amount currently owed
 - Must be properly executed with the date, complete notarization and two witnesses
 - Must include your current mailing address
- Proof of officer's authority to request funds (if claiming on behalf of a business)
- Legible copy of a government issued photo identification
 - Must be a valid Driver License, ID card, or Passport that shows address and DOB
- Contact information with which you may be reached for questions or additional information regarding your claim if necessary
 - Email, phone number(s) and/or different mailing address
- Other information as needed

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Third Party

To claim surplus funds you must submit the following prior to the expiration of the claim period:

- Notarized Assignment or Power of Attorney
 - Must reference the tax deed number
 - Must state the interest in the property and/ or surplus funds
 - Must indicate amount of surplus funds being assigned/claimed
 - Must be properly executed with the date, complete notarization and two witnesses
- Notarized Affidavit of Claim
 - Must reference the tax deed number
 - Must state your interest in the property and/or surplus funds
 - Must be properly executed with the date, complete notarization and two witnesses
 - Must include your current mailing address
- Legible copy of a government issued photo identification for each party
 - Must be a valid Driver License, ID card, or Passport that shows address and DOB
- Probate documentation for the estate (if applicable)
 - Must reference the tax deed
 - Must be filed in Florida (preferably Lee County where property is located)
 - Must list all heirs/beneficiaries and their entitlement
 - Must be a certified copy from the court of final order
 - If case is not finalized – must be a certified copy of the Petition
- Contact information with which you may be reached for questions or additional information regarding your claim if necessary
 - Email, phone number(s) and/or different mailing address
- Other information as needed

Please remember to reference the tax deed number on all claim documents, id's, correspondence and emails submitted to our office.