

# County Manager's Office



## COUNTY OF SAN MATEO

COUNTY GOVERNMENT CENTER • REDWOOD CITY • CALIFORNIA 94063-1662  
WEB PAGE ADDRESS: <http://www.co.sanmateo.ca.us>

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JOHN L. MALTBIE  
COUNTY MANAGER  
CLERK OF THE BOARD

(650) 363-4123  
FAX: (650) 363-1916

February 10, 2003

SRI International  
333 Ravenswood Ave.  
Menlo Park, CA 94025

**Subject:** *Claim for refund of property taxes for SRI International for Parcel No(s). 062-390-660, 062-390-670, 062-390-730, 062-390-740, and 062-390-760*

This will acknowledge receipt of your claim for refund of property tax for the referenced parcel(s). Your claim has been referred to the County Counsel for investigation and recommendation to the Board of Supervisors.

When I have the County Counsel's report, I will send you a copy and notify you of the date the Board will consider the matter.

Sincerely,

JOHN L. MALTBIE  
County Manager/Clerk of the Board

c: County Counsel  
Tax Collector  
Assessor



December 9, 2002

Mr. John L. Maltbie  
County Manager/Clerk of the Board  
San Mateo County Board of Supervisors  
400 County Center  
Redwood City, CA 94063

Dear Mr. Maltbie:

## CLAIM FOR REFUND

**Name of Taxpayer:** SRI International  
**Taxpayer Parcel Nos.:** 062-390-660, 062-390-670, 062-390-730, 062-390-740,  
and 062-390-760  
**Addresses:** 301 and 333 Ravenswood Drive

1. Pursuant to Section 5096 and Section 5097 of the Revenue and Taxation Code of the State of California, the undersigned hereby makes a claim for refund of \$1,437,867 or such other amounts as may be established, in tax, interest and penalty in connection with the following:
2. On or about **December 10, 1998**, there was paid by SRI International property taxes of \$718,933.31 to the County of San Mateo. SRI International subsequently paid the remainder property taxes to the County of San Mateo when the second installment was due in April of 1999.
3. SRI International is rightfully entitled to, and now does claim a refund for the overpayment of the taxes described above. SRI International's real and business property was qualified for an exemption from property taxation under Section 214 of the Revenue and Taxation Code of California since such property was used exclusively for charitable purposes and was owned by SRI International, a nonprofit organization operating for those purposes.
4. SRI International submits the following statements of fact in support of its claim for exemption for property taxes under Section 214 of the Revenue and Taxation Code of California:

- SRI International is not organized for profit.

### SRI International

333 Ravenswood Ave. • Menlo Park, CA 94025 • (650) 859-2000

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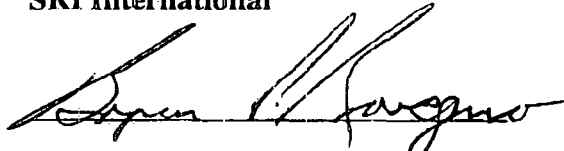
- SRI International is exempt from franchise or income tax under the provisions of Section 23701d of the Revenue and Taxation Code of California.
- SRI International is exempt from federal income tax under the provisions of Section 501(c)(3) of the Internal Revenue Code.
- No part of the net earnings of the company is for the benefit of any private shareholder or individual.
- The primary exempt purposes of SRI International include, but are not limited to, the following: to promote educational purposes by encouraging, fostering and conducting research in the physical, biological and social sciences, engineering and the mechanic arts, and to extend scientific knowledge in the several pursuits and professions of life, and to develop and research new ideas, products, and policy for use in various disciplines.
- The property is used for the actual operation of the exempt activity.

SRI International and KPMG LLP, as acting agent, verify this claim for refund. I declare under penalty of perjury under the laws of the State of California, that the forgoing is true and correct.

Dated: December 9, 2002

Name of Taxpayer: **SRI International**

Signed By:



Title or Position:

Treasurer/Controller

Date Signed:

12/6/02