

PTAX-340 2016 Senior Citizens Assessment Freeze Homestead Exemption Application and Affidavit

Last date to apply: _____

Part 1: Applicant information (Please type or print.)

1 _____
First name MI Last name

3 _____
Tax ID number

2 _____
Mailing address

4 ____/____/____
Date of birth (month, day, year)

City State ZIP

5 (____) ____ - ____
Area code and phone number

Part 2: Property information

1 _____
Street address of property for which this exemption application is filed Township

City IL ZIP County

2 _____
Property (parcel) index number (PIN)

Note: The PIN is shown on your property tax bill. You also may obtain it from your chief county assessment officer (CCAO). If you cannot obtain the PIN, attach a copy of the legal description.

3 Have you or your spouse received this exemption for this property previously? Yes No
If you answered "Yes", write the base year, if known.

4 If your spouse maintains a separate residence, has he or she applied for this exemption? Yes No

Part 3: Household income for 2015

You must include the income of you, your spouse, and all other individuals who live in your household.

- 1 Social Security and SSI benefits. Include Medicare deductions in this total.
2 Railroad Retirement benefits. Include Medicare deductions in this total.
3 Civil Service benefits
4 Annuities, federally taxable pensions and retirement plan distributions.
5 Human Services and other governmental cash public assistance benefits
6 Wages, salaries, and tips from work
7 Interest and dividends received
8 Net rental, farm, and business income or (loss). (See instructions for Line 8.)
9 Net capital gain or (loss). (See instructions for Line 9.)
10 Other income or (loss). (See instructions for Line 10.)
11 Add Lines 1 through 10.

12 Certain subtractions. You may subtract only the reported adjustments to income from U.S. 1040, Line 36, or U.S. 1040A, Line 20.

Table with 2 columns: Subtraction item, Amount. Rows 12a and 12b.

Add the amounts on Lines 12a and 12b, and write the result. 12 _____

13 Subtract Line 12 from Line 11, and write the result. This is your total household income for 2015. If the amount is greater than \$55,000, STOP. You do not qualify for this exemption. 13 _____

Do not write in this space.

Date received
Application number
Base year
Revised base year
Approved Yes No

Income verified
Base year EAV
Revised base year EAV
EAV of added improvements
Base amount
Yes No

Part 4: Affidavit

Sworn under oath, I state the following:

1 (Mark the statement that applies.)

On January 1, 2016, the property identified in Part 2, Line 1, was improved with a permanent structure

a _____ that I used as my principal residence.

b _____ for which I received this exemption previously and is either unoccupied or used as my spouse's principal residence. I am now a resident of a facility licensed under the Assisted Living and Shared Housing Act, Nursing Home Care Act, ID/DD (intellectually disabled/developmentally disabled) Community Care Act, or Specialized Mental Health Rehabilitation Act of 2013.

Name of facility

Mailing address

2 (Mark the statement that applies.)

On January 1, 2016, I

a _____ was the owner of record of the property identified in Part 2, Line 1.

b _____ had a legal or equitable interest by a written instrument in the property listed in Part 2, Line 1.

c _____ had a leasehold interest in the property identified in Part 2, Line 1, that was used as a single-family residence.

3 I am liable for paying real property taxes on the property identified in Part 2, Line 1.

Note: If I have not received this exemption for this property previously, I also met the eligibility requirements listed in Part 4, Lines 1, 2, and 3 for this property on January 1, 2015.

4 (Mark the statement that applies.)

a _____ In 2016, I am, or will be, 65 years of age or older.

b _____ In 2016, my spouse, who died in 2016, would have been 65 years of age or older. (Complete the following information.)

Deceased spouse's name

Tax ID number

_____/_____/_____
Date of birth (month, day, year)

_____/_____/_____
Date of death (month, day, year)

5 The property identified in Part 2, Line 1, is the only property for which I am applying for a senior citizens assessment freeze homestead exemption for 2016.

6 The amount reported in Part 3, Line 13, of this form includes the income of my spouse and all persons living in my household and the total household income for 2015 is \$55,000 or less.

7 On January 1, 2016, the following individuals also used the property identified in Part 2, Line 1, for their principal residence. My spouse is included if he or she used the property as his or her principal dwelling place on January 1, 2016. The total income of all individuals and my spouse (regardless of his or her principal residence) are included in Part 3. (Attach an additional sheet if necessary.)

First and last name

Tax ID number

a _____
b _____

8 (Mark the statement that applies.) **Only complete the name and address of spouse below if you marked "C"**

On January 1, 2016, I was

a _____ single, widow(er), or divorced. **b** _____ married and living together. **c** _____ married, but not living together.

My spouse's name and address is

First name

MI

Last name

Street Address

City

State

ZIP

Under penalties of perjury, I state that, to the best of my knowledge, the information contained in this affidavit is true, correct, and complete.

Signature of applicant

_____/_____/_____
Date (month, day, year)

Note: The CCAO may conduct an audit to verify that the taxpayer is eligible to receive this exemption.

Mail your completed Form PTAX-340 to:

If you have any questions, please call:

Co. Chief County Assessment Officer

(_____) _____

Mailing address

Last date to apply ____/____/____
Month Day Year

City IL
ZIP

This form is authorized in accordance with the Illinois Property Tax Code. Disclosure of this information is required. Failure to provide information may result in this form not being processed and may result in a penalty.