

PTAX-341 Application for Returning Veterans' Homestead Exemption

Step 1: Complete the following information

1 _____
Property owner's name

_____ **IL** _____
Street address of homestead property State ZIP

_____ **IL** _____
City State ZIP

() _____
Daytime phone

Send notice to (if different than above)

2 _____
Name

_____ **IL** _____
Mailing address State ZIP

_____ **IL** _____
City State ZIP

() _____
Daytime phone

3 Write the assessment year for which you are filing this form. _____
Year

4 Write the property index number (PIN) of the property for which you are requesting the returning veterans' homestead exemption. Your PIN is listed on your property tax bill or you may obtain it from the chief county assessment officer (CCAO). If you are unable to obtain your PIN, write the legal description on Line b.

a PIN _____ - _____ - _____ - _____ - _____

b Write the legal description only if you are unable to obtain your PIN. (Attach a separate sheet if needed.)

Step 2: Complete eligibility information

5 Are you a veteran and an Illinois resident? Yes No

6 Have you served as a member of the U.S. Armed Forces, Illinois National Guard, or U.S. Reserve Forces? Yes No

7 Did you return from active duty in an armed conflict involving the armed forces of the United States? Yes No

• If YES,

a Write the name of your base or duty location in the U.S.

b Write the date you returned home. _____
Month / Day / Year

8 Check your type of residence.
 Single-family dwelling Duplex
 Townhouse Condominium
 Apartment Other _____

9 Is the residence operated as a cooperative? Yes No

10 On January 1, were you the owner of record or did you have a legal or equitable interest in this property? Yes No

• If No, write the date you acquired an interest in this property. _____
Month / Day / Year

11 On January 1, did you occupy this property as your principal residence? Yes No

12 On January 1, were you liable for the payment of real estate taxes on this property? Yes No

Note: You must provide documentation with this form. See the section on the back of this form "Do I need to provide documentation with this form?".

Step 3: Attach proof of ownership

13 Check the type of documentation you are attaching as proof that you are the owner of record or have a legal or equitable interest in the property.

Deed Contract for deed
 Trust agreement Other written instrument
 Lease (specify) _____

14 Write the date the written instrument was executed. _____
Month / Day / Year

15 Is the instrument recorded? Yes No

16 If known, write the date recorded and the document number from the county records.

Date recorded _____
Month / Day / Year

Recorded document number _____

Step 4: Sign below

I state that to the best of my knowledge, the information on this application is true, correct, and complete.

Property owner's or authorized representative's signature

Month / Day / Year

Form PTAX-341 General Information

What is the Returning Veterans' Homestead Exemption?

The returning veterans' homestead exemption (35 ILCS 200/15-167) provides a one-time \$5,000 reduction in the equalized assessed value (EAV) of the veteran's principal residence for the taxable year that the veteran returns from active duty in an armed conflict involving the armed forces of the United States. The veteran must own and occupy or lease and occupy the property on January 1 of the assessment year as his or her principal residence.

Note: For purposes of this exemption, "occupy" means your principal place of dwelling which is "the place where a person has his or her true, fixed permanent home and principal establishment, and to which, whenever he or she is absent, he or she has the intention of returning".

Who is eligible?

To qualify for this exemption you must

- be an Illinois resident who has served as a member of the U.S. Armed Forces, Illinois National Guard, or U.S. Reserve Forces,
- return from active duty in an armed conflict involving the armed forces of the U.S.,
- have owned or had a legal or equitable interest in the property used as your principal place of residence on January 1 of the assessment year, and
- be liable for the payment of the property taxes.

Note: A veteran who dies during his or her active duty service is eligible to receive this exemption.

A resident of a cooperative apartment building qualifies for this exemption if the resident is the owner of record of a legal or equitable interest in the property, occupies it as a principal residence, and is liable by contract with the owner(s) of record for the payment of property taxes.

Note: A resident of a cooperative apartment building who has a leasehold interest **does not** qualify for this exemption.

When will I receive my exemption?

You should apply for this exemption for the assessment year that you return home. The county board of review, while in session for

the assessment year, has the final authority to grant your exemption. If your exemption is granted, it will be applied to the property tax bill paid the year following the assessment year.

What if I am called to active duty again in a subsequent assessment year, can I receive the exemption again?

Yes. The law states the exemption is "only for the taxable year in which the veteran returns from active duty in an armed conflict involving the armed forces of the U.S.". This means the exemption is only for a single year, but you can receive the exemption again if you return from active duty in a subsequent year.

Do I need to provide documentation with this form?

The CCAO will require you to provide documentation to verify that you are eligible for this exemption. If you were discharged from active duty service, you will need to provide the Department of Defense DD Form 214 certified by the county recorder or recorder of deeds, or Illinois Department of Veterans' Affairs. If you are still on active duty after returning home, you will need to provide your military orders and travel voucher showing the date of your return. The documents must state that you are returning from an armed conflict involving the armed forces of the U.S. within the tax year that you are requesting this exemption. You may attach a separate sheet describing your specific factual situation.

What if I need additional assistance?

If you need additional assistance with this form, please contact your (CCAO), whose telephone number and address are shown in the next section.

When and where must I file?

You will need to apply for this exemption each year that you return home from active duty in an armed conflict involving the U.S. to receive this exemption. Contact your CCAO at the address and telephone number shown below to verify any due date for filing this application in your county. File this form with the CCAO at the address shown below.

If you have any questions, please call:

(618) 687-7220

Mail your completed Form PTAX-341 to:

Jackson County Chief County Assessment Officer
20 S. 10th St
Mailing address
MURPHYSBORO IL 62966
City ZIP

Official use. Do not write in this space.

Date received

____/____/____
Month Day Year

Board of review action date

____/____/____
Month Day Year

Verify proof of eligibility _____

Approved

Denied

Reason for denial: _____

Comments: _____

Comments: _____