

# PTAX-341 Application for Returning Veterans' Homestead Exemption

## Step 1: Complete the following information

**1** \_\_\_\_\_  
Property owner's name

\_\_\_\_\_  
Street address of homestead property

\_\_\_\_\_  
City **IL** State ZIP

(\_\_\_\_\_) \_\_\_\_\_  
Daytime phone

Send notice to (if different than above)

**2** \_\_\_\_\_  
Name

\_\_\_\_\_  
Mailing address

\_\_\_\_\_  
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 your 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", write the date you returned home. \_\_\_\_\_  
Month / Day / Year

**8** Check your type of residence.

<input type="checkbox"/> Single-family dwelling	<input type="checkbox"/> Duplex
<input type="checkbox"/> Townhouse	<input type="checkbox"/> Condominium
<input type="checkbox"/> Apartment	<input type="checkbox"/> 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 back of this form "Do I need to provide documentation?"

## 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.

<input type="checkbox"/> Deed	<input type="checkbox"/> Contract for deed
<input type="checkbox"/> Trust agreement	<input type="checkbox"/> Other written instrument
<input type="checkbox"/> Lease	Specify: _____

**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 \_\_\_\_\_

**14** Write the date the written instrument was executed. \_\_\_\_\_  
Month / Day / Year

## 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 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,
- have returned 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 land on which a single-family residence is situated and 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 representative can apply on behalf of a deceased veteran who has met the qualifications listed above.

## Is the resident of a cooperative apartment eligible?

To qualify for this exemption, the resident must be

- the owner of record of a legal or equitable interest in the property,
- occupy it as a principal residence, and
- be liable by contract with the owner(s) of record for the property tax payments.

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

## Can I receive the exemption again?

The law states the exemption applies "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.". You may be eligible for this exemption again if you return from active duty in a subsequent year.

## Do I need to provide documentation?

Your Chief County Assessment Officer (CCAO) will require documentation to verify your eligibility for this exemption.

If you were discharged from active duty service, you must provide

- the original Form DD 214; or
- a copy of Form DD 214 certified by the county recorder, recorder of deed's, IL Dept. of Veterans' Affairs, or the National Archives Record Center.

If you are still on active duty after returning home, you must provide

- Form DD 220; or
- military orders and travel voucher stating 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.

## When and where must I file Form PTAX-341?

You should apply for this exemption each year when you return from active duty in an armed conflict involving the armed forces of the United States. Contact your CCAO to verify your county's due date or if you need assistance at the telephone number listed below. Mail your completed Form PTAX-341 and supporting documentation to the address below.

## If you have any questions, please call:

( 217 ) 753-6805

## Mail your completed Form PTAX-341 to:

SANGAMON County Chief County Assessment Officer  
200 S 9TH ST., RM 210

Mailing address  
SPRINGFIELD IL 62701  
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: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_