

PTAX-340 2008 Senior Citizens Assessment Freeze Homestead Exemption Application and Affidavit

Last date to apply: July 1, 2008

Part 1: Application Information

<p>1 _____ First Name MI Last Name</p> <p>2 _____ Mailing Address</p> <p>_____ City State Zip</p>	<p>3 _____ / _____ / _____ Date of Birth (month, day, year)</p> <p>4 (_____) _____ Telephone Number (include area code)</p>
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Part 2: Property Information

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

City State Zip _____
Property Index Number (PIN)

2 Have you or your spouse previously received this exemption on this property? Yes No

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

Part 3: Household Income for 2007

You must include the income of all individuals who live in your household.

1 Social Security, SSI benefits. Include Medicare deductions in this total.		1 _____ _____
2 Railroad Retirement benefits. Include Medicare deductions in this total.		2 _____ _____
3 Civil Service Benefits		3 _____ _____
4 Annuity benefits & federally taxable pension & IRA benefits. (See instructions for Line 4)		4 _____ _____
5 Human Services and other governmental cash public assistance benefits		5 _____ _____
6 Wages, salaries, and tips from work		6 _____ _____
7 Interest and dividends received		7 _____ _____
8 Net rental, farm and business income or (loss). (See instructions for Line 8)		8 _____ _____
9 Net capital gain or (loss). (See instructions for Line 9)		9 _____ _____
10 Other income or (loss). (See instructions for Line 10)		10 _____ _____
11 Add Lines 1 through 10		11 _____ _____
12 Certain subtractions. You may subtract only the reported adjustments to income from U.S. 1040, Line 36, or U.S. 1040A, Line 20.		
Subtraction item	Amount	
12a _____	_____ _____	
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 2006. If the amount is greater than \$55,000 - STOP -You do not qualify.		13 _____ _____

Continue to the back

Do not write in this space - For office use only

Date received _____	
Base Year _____	Base Year _____
Income Verified <input type="checkbox"/> Yes <input type="checkbox"/> No	Base Year EAV _____
Approved <input type="checkbox"/> Yes <input type="checkbox"/> No	EAV added for improvements _____
	Revised Base Year EAV _____

Part 4: Affidavit

Sworn under oath, I state the following:

1 (Mark all that apply)

- a _____ On January 1, 2008, the property identified in Part 2, Line 1, was improved with a permanent structure that I used as my principal residence.
- b _____ On January 1, 2008, the property identified in Part 2, Line 1, was improved with a permanent structure for which I received this exemption previously but I am now a nursing home residence. The property currently is either unoccupied or used as my spouse's principal residence.

2 (Mark all that apply)

- a _____ On January 1, 2008, I was the owner of record of the property identified in Part 2, Line 1.
- b _____ On January 1, 2008, I had a legal or equitable interest by written instrument in the property.
- c _____ On January 1, 2008, I had a leasehold interest in this property, 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, 2007.

4 (Mark all that apply)

- a _____ In 2008, I am, or will be, 65 year of age or older.
- b _____ In 2008, my spouse, who died in 2008, would have been 65 years of age or older.

_____ / / _____
 Deceased spouse's name Date of death

5 The property identified in Part 2, Line 1, is the only property for which I have applied for a senior citizens assessment freeze homestead exemption for 2008.

6 The amount reported in Part 3, Line 13, of this form includes the income of all persons living in my household and the total household income for 2007 is \$55,000 or less.

7 On January 1, 2008, the following individuals also used the property as their principal residence. My spouse is included if he or she used the property as his or her principal dwelling on January 1, 2008. The income of the individuals listed below is included in Part 3.

	First and last name	Age	Relationship to applicant
a	_____	_____	_____
b	_____	_____	_____
c	_____	_____	_____
d	_____	_____	_____

8 (Mark the statement that applies)

- a _____ On January 1, 2008, I was single, widow(er), or divorced.
- b _____ On January 1, 2008, I was married and living with my spouse.
- c _____ On January 1, 2008, I was married, but not living with my spouse.

_____ Spouse's name _____ Spouse's Address

Under penalties of perjury, I state that, to the best of my knowledge, the information contained in this affidavit is true, correct and complete. *Note - The CCAO may conduct an audit to verify that the taxpayer is eligible for this exemption.

_____ / / 2008
 Signature of Applicant Date (month, day year)

Subscribed and sworn to before me this _____ day of _____ 2007 _____ Notary Public

Mail your completed PTAX-340 Form to:
 Livingston County Assessment Office
 110 W Water St, Suite 2
 Pontiac, IL 61764

If you have any questions, please call
 (815) 844-7214

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