



# APPLICATION For REAL ESTATE TRANSFER TAX REFUND

As provided for in § 39-164 of the Lake Forest City Code, a taxpayer who has purchased property in the City, and has paid the Real Estate Transfer Tax provided for in § 39.155, shall be entitled to a refund lesser than or equal to the amount of such tax up to \$2,000; provided the following requirements are met:

- A. Taxpayer bought & sold property where the closing dates fall within 12 calendar months of each other
- B. Sold property was taxpayer's primary residence
- C. Taxpayer has not received a Transfer Tax Refund within 3 years immediately preceding submission of this refund application
- D. A completed Application for Real Estate Transfer Tax Refund is submitted within 12 months of the most recent closing

**INSTRUCTIONS:**

Submit the complete, notarized form via email ([LFFinance@cityoflakeforest.com](mailto:LFFinance@cityoflakeforest.com)), mail, or drop off, to the Finance Department/Municipal Services, 800 N Field Dr, Lake Forest, IL 60045. Unless directed otherwise, the refund check will be made payable to the taxpayer(s) and mailed to the purchased property address. Please allow up to four (4) weeks for processing.

Questions? Contact Finance at 847-810-3618 or [LFFinance@cityoflakeforest.com](mailto:LFFinance@cityoflakeforest.com)

**SOLD PRIMARY RESIDENCE:**

Address of Sold Property	
Property Index Number (PIN)	
Date of Closing	

**PURCHASED PROPERTY:**

Address of Purchased Property	
Property Index Number (PIN)	
Date of Closing	
Full Actual Consideration Paid	
Real Estate Transfer Tax Paid	

CITY OF LAKE FOREST	}	
COUNTY OF LAKE	}	<b>AFFIDAVIT</b>
STATE OF ILLINOIS	}	

I/We, the undersigned Taxpayer(s), hereby declare the facts contained in, or attached, to this application to be true and correct.

Printed Name  
Applicant/Taxpayer(s): \_\_\_\_\_ Date: \_\_\_\_\_

Signature  
Applicant/Taxpayer(s): \_\_\_\_\_

Phone #: \_\_\_\_\_

Email: \_\_\_\_\_

State of _____	
County of _____	
This instrument was acknowledged before me on _____ (date) by _____ (name/s of person/s.)	
(Seal)	_____ (Signature of Notary Public)