



# IL-1018 Real Estate/Special Assessment Tax Deferral and Recovery Agreement for Tax Year 2020

Name of owners:

\_\_\_\_\_  
Last First Middle initial

\_\_\_\_\_  
Last First Middle initial

Write the homestead property index number (PIN). \_\_\_\_\_

Write the legal description of the homestead property. Attach additional sheets if needed.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I, the owner and applicant, agree:

- 1 that the total amount of property taxes, including special assessments, deferred under the Senior Citizens Real Estate Tax Deferral Act, 320 ILCS 30/1, *et seq.*, plus interest, for the year for which a deferral is claimed, as well as for those previous years for which the property taxes, including special assessments, are not delinquent and for which such deferral has been claimed may not exceed 80 percent of my equity interest in the property for which property taxes, including special assessments, are to be deferred and that, if the total deferred property taxes, including special assessments, plus interest, equals 80 percent of my equity interest in the property, I shall thereafter pay the annual interest due on such deferred property taxes, including special assessments, plus interest, so that total deferred property taxes, including special assessments, plus interest, will not exceed such 80 percent of my equity interest in the property.
- 2 that any property taxes, including special assessments, deferred under the Act and any interest accrued thereon at the rate of 6 percent per year, are a lien on the real estate and improvements thereon until paid. **No sale or transfer of such real property may be legally closed and recorded until the property taxes, including special assessments, which would otherwise have been due on the property, plus accrued interest, have been paid unless the collector certifies in writing that an arrangement for prompt payment of the amount due has been made with his or her office. The same shall apply if the property is to be made the subject of a contract of sale.**
- 3 that upon my death, the heirs-at-law, assignees, or legatees shall have first priority to the real property upon which property taxes, including special assessments, have been deferred by paying in full the total property taxes, including special assessments, that would otherwise have been due, plus interest. However, if such heir-at-law, assignee, or legatee is my surviving spouse, the deferred status of the property shall be continued during the life of my surviving spouse if the spouse is 55 years of age or older within six months of the date of my death and my spouse enters into a deferral and recovery agreement before the time when deferred property taxes, including special assessments, become due under Section 3 of the Act. Any additional deferred property taxes, including special assessments, plus interest, on the real property under a deferral and recovery agreement signed by my surviving spouse shall be added to the property taxes, including special assessments, and interest which would otherwise have been due, and the payment of which has been postponed during the life of my surviving spouse, in determining the 80 percent equity requirement provided by this Section.



**CONTACT FORM/CHECK LIST -2021**

**REPEATS - Please include this page and COPIES of the following with your application:**

- 2020 Social Security 1099, statements of all income including Medicare, dividends, interest, wages etc.**
- Current proof of renewed fire and casualty insurance for your residence.**  
**\*\*\*\*If you own a condominium or townhouse, please enclose your Association's master declaration of insurance for the physical structure of your unit.**  
**\*\*\*\*If you own a home, please enclose a copy of your homeowners insurance.**
- Mortgage Balances (latest statement) if applicable. Please bring a copy of your mortgage statement or a letter from your mortgage company showing that you are current on all mortgage payments for 2020.**

**FIRST TIME - Senior Deferral Applicants Checklist:**

- Deed (proof of ownership)**
- Proof of Social Security Number**
- Verification of all income**
- Insurance Declaration Page & evidence of payment**
- Mortgage Balance (latest statement and current payment information).**
- Proof of age**

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Please complete the following **Contact Information** for the DuPage County Treasurer with the name and address of a **friend or family member** we may contact in case of necessity.

**Date** \_\_\_\_\_

**Your Name** \_\_\_\_\_

**Contact Name** \_\_\_\_\_

**Relationship** \_\_\_\_\_

**Address** \_\_\_\_\_

**Phone Number** \_\_\_\_\_

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**Also please be aware of the following when filling out your applications:**

Make sure you sign your applications, IL-1017 in Step 5, where noted and IL-1018 (IL-1018 signature only must be notarized at time of signing).

If your property is in a Land Trust, please have the trustee at the financial institution holding the trust sign the IL-1017 in Step 5 where noted.

If your property is in Joint Ownership, your spouse must also sign the IL-1017 in Step 5 where noted.

If your application is being completed by a Power of Attorney, the signature lines should read:

John Senior, By Jane Smith, as POA

(Senior Applicants Name) (Name of Power of Attorney)

The Power of Attorney's signature must be notarized and your application must include a copy of the Power of Attorney Document.