

Real Estate Transfer Tax Refund Application Form

Instructions:

1. Complete this application to request a Real Estate Transfer Tax refund. Return the application to the City's Finance Department, 303 W. Wesley St., P.O. Box 727, Wheaton, Illinois 60187-0727, **after the property purchased has closed and the property sold has closed.**
2. ARTICLE VII, SECTION 66-194 of the Wheaton Municipal Code provides for a refund of Real Estate Tax paid under the following conditions:
 - A. A grantee, buyer, assignee, or transferee who has paid the tax provided for in this Article shall be entitled to a refund if:
 1. Such grantee, buyer, assignee, or transferee was a resident of a single-family dwelling or condominium unit, or owner of a commercial or retail business within the corporate limits of the City and sold said property within one (1) year prior to the purchase of an owner-occupied single-family dwelling or condominium unit or owner-occupied retail business within the City of Wheaton and which is subject to the tax provided in this Article.
 - B. A grantee, buyer, assignee or transferee who has paid the tax provided for in this Article shall be entitled to a refund of such tax if at least one of the grantees is the natural born or adopted child of one of the grantors of the real property which is the subject of the transfer and tax.
3. If approved, a check will be issued in approximately 30 days.

I declare that I am eligible for a refund of Wheaton Real Estate Transfer Tax according to paragraph A or B (circle one) of the Wheaton Municipal Code shown above and that both the purchase and sale of the properties listed have closed.

Name of Purchaser: _____

Date of Property Purchased: _____

Address of Property Purchased: _____

Amount of Tax Paid: \$ _____

Date of Property Sold: _____

Address of Property Sold: _____

Signature: _____ Date: _____

Finance Department Only			
Date of Filing with City	Property Purchased Transfer Stamp Number	Sold Property Transfer Stamp Number	Employee Initials

Date Refund Approved	Director of Finance Approval