

# Mortgage Interest Form -- Part 1, Mortgage & Home Equity Interest Tax Year 20\_\_\_\_\_

Your Name \_\_\_\_\_ Fair Market Value of Home: \$ \_\_\_\_\_

Loan	Lender	\$ Interest Paid	Loan Balance Jan. 1	Loan Balance Dec. 31	Lowest Interest Rate Paid During Year
1st Home Mortgage					
2nd Home Mortgage					
3rd Home Mortgage					
Home Equity Loan					
Home Equity Loan					
Home Equity Loan					
Home Equity Loan					

If you paid Mortgage Insurance Premiums: Date of contract \_\_\_/\_\_\_/\_\_\_ (Must be after 12/31/2006) Amount of premium paid: \$ \_\_\_\_\_

**Mortgage Paid to Individuals:**  
 Paid to (Name) \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_ ZIP \_\_\_\_\_  
 Social Security Number \_\_\_\_\_

**Mortgage Paid to Individuals:**  
 Paid to (Name) \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_ ZIP \_\_\_\_\_  
 Social Security Number \_\_\_\_\_

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**Mortgage Interest Form -- Part 2, Home Loans** Use separate form for 2nd home or additional loans

Home Address: \_\_\_\_\_ Original Cost of Home: \$ \_\_\_\_\_ Your Name \_\_\_\_\_

**Initial Mortgage on home**

Date of Loan \_\_\_/\_\_\_/\_\_\_ Lender \_\_\_\_\_ Loan Amount \$ \_\_\_\_\_ Loan Rate \_\_\_\_\_  
If Fixed \_\_\_\_\_ % (Years: \_\_\_\_\_)

If loan refinanced, what was amount of pay-off refinanced by new loan? \$ \_\_\_\_\_

**New Loan:** New Mortgage?  Home Equity Loan?

Date of Loan \_\_\_/\_\_\_/\_\_\_ Lender \_\_\_\_\_ Loan Amount \$ \_\_\_\_\_ Loan Rate \_\_\_\_\_  
If Fixed \_\_\_\_\_ % (Years: \_\_\_\_\_)

Amount of loan spent on home improvements \$ \_\_\_\_\_ If loan refinanced, what was balance refinanced by new loan? \$ \_\_\_\_\_  
Amount spent on investments, business \$ \_\_\_\_\_ Describe \_\_\_\_\_

**New Loan:** New Mortgage?  Home Equity Loan?

Date of Loan \_\_\_/\_\_\_/\_\_\_ Lender \_\_\_\_\_ Loan Amount \$ \_\_\_\_\_ Loan Rate \_\_\_\_\_  
If Fixed \_\_\_\_\_ % (Years: \_\_\_\_\_)

Amount of loan spent on home improvements \$ \_\_\_\_\_ If loan refinanced, what was balance refinanced by new loan? \$ \_\_\_\_\_  
Amount spent on investments, business \$ \_\_\_\_\_ Describe \_\_\_\_\_

**New Loan:** New Mortgage?  Home Equity Loan?

Date of Loan \_\_\_/\_\_\_/\_\_\_ Lender \_\_\_\_\_ Loan Amount \$ \_\_\_\_\_ Loan Rate \_\_\_\_\_  
If Fixed \_\_\_\_\_ % (Years: \_\_\_\_\_)

Amount of loan spent on home improvements \$ \_\_\_\_\_ If loan refinanced, what was balance refinanced by new loan? \$ \_\_\_\_\_  
Amount spent on investments, business \$ \_\_\_\_\_ Describe \_\_\_\_\_

**New Loan:** New Mortgage?  Home Equity Loan?

Date of Loan \_\_\_/\_\_\_/\_\_\_ Lender \_\_\_\_\_ Loan Amount \$ \_\_\_\_\_ Loan Rate \_\_\_\_\_  
If Fixed \_\_\_\_\_ % (Years: \_\_\_\_\_)

Amount of loan spent on home improvements \$ \_\_\_\_\_ If loan refinanced, what was balance refinanced by new loan? \$ \_\_\_\_\_  
Amount spent on investments, business \$ \_\_\_\_\_ Describe \_\_\_\_\_

