

DEDUCTIONS (CON'T.)
INTEREST & TAX DEDUCTIONS
(PLEASE PROVIDE ALL INTEREST FORMS 1098 RECEIVED)

HOME MORTGAGE INTEREST PAID TO FINANCIAL INSTITUTIONS: _____

HOME MORTGAGE INTEREST PAID TO INDIVIDUALS : _____

NAME: _____

ADDRESS: _____

SOCIAL SECURITY NUMBER: _____

NAME: _____

ADDRESS: _____

SOCIAL SECURITY NUMBER: _____

DATE OF MORTGAGE(S): _____

IS MORTGAGE FOR: PRINCIPAL HOME ____ OR SECOND HOME ____

PERCENTAGE POINTS PAID ON MORTGAGE FOR NEW HOUSE _____

PERCENTAGE POINTS PAID ON REFINANCE _____

TERM OF MORTGAGE _____

MORTGAGE PENALTIES FOR PREPAYMENT _____

INTEREST TO CARRY OR PURCHASE INVESTMENT PROPERTY _____

REAL ESTATE TAXES (PROPERTY & SCHOOL) _____

INTEREST PAID ON STUDENT
LOANS _____

WERE THE LOAN PROCEEDS USED FOR EDUCATIONAL EXPENSES (FEES,
TUITION, BOOKS, SUPPLIES, ROOM & BOARD, & RELATED EXPENSES)?

YES ____ NO ____

AT THE TIME THE LOAN WAS TAKEN OUT, WAS IT FOR YOURSELF, YOUR
SPOUSE, OR A
DEPENDENT? YES ____ NO ____