

# REAL ESTATE FORM

\_\_\_\_\_  
LAST NAME

\_\_\_\_\_  
FIRST NAME

\_\_\_\_\_  
MIDDLE

**DID YOU PAY MORTGAGE INTEREST AND/OR PROPERTY TAX FOR YOUR MAIN HOME LAST YEAR?**  YES |  NO

**IF YES, PLEASE SHARE THESE DOCUMENTS FOR YOUR TAX FILING:**

**ALL 1098-INT MORTGAGE STATEMENTS YOU RECEIVE FROM YOUR MORTGAGE PROVIDERS**

- This statement tells us the total **Mortgage Interest, Points and Property Taxes** you paid for the year.
- If the sum of these tax deductions is greater than the IRS's Standard Deduction, we will claim them.

**PLEASE SHARE PROOF OF PROPERTY TAX PAYMENTS MADE OUTSIDE YOUR MORTGAGE**

- If you paid property taxes in advance, please share proof of payment and the year of tax assessment.
- This especially applies to any homeowner who pre-paid property taxes out-of-pocket last year

**DID YOU PURCHASE YOUR MAIN HOME OR REFINANCE LAST YEAR?**  YES |  NO

**IF YES, PLEASE SHARE THESE DOCUMENTS FOR YOUR TAX FILING:**

**YOUR HUD STATEMENT or CLOSING SETTLEMENT STATEMENT (Received at time of closing)**

- This statement will inform us of any tax deductions you may paid for before your (new) mortgage began.
- Whether you just purchased your home or re-finance, the HUD Statement is an important document.
- The HUD Statement or Closing Statement looks like a large Excel spreadsheet, typically 2-3 pages long.

**WE ALSO REQUIRE TO SEE YOUR FIRST MONTH'S MORTGAGE STATEMENT**

- This statement will inform us if your mortgage company included ANY payments at closing on Form 1098
- If your statement confirms that your Form 1098 does NOT include specific deductions, we will claim them

**IF YOU HELD MULTIPLE MORTGAGES, PLEASE MAKE SURE YOU KNOW YOUR TOTAL PROPERTY TAX PAID**

- Your city or township of residence may provide you a receipt or form in the post.
- Some townships allow you to view and verify your property tax information online
- If you are unsure about your property taxes paid, please contact your mortgage company.

**DID YOU MAKE ANY ENERGY EFFICIENT UPGRADES TO YOUR HOME?**  YES |  NO

**PLEASE NOTE THAT VERY SPECIFIC TYPES OF PURCHASES/UPGRADES QUALIFY FOR IRS TAX DEDUCTION. YOU MUST HAVE ENERGY STAR OR OTHER CERTIFICATION THAT IS RECOGNIZED BY THE IRS TO QUALIFY AS WELL. FOR YOUR REFERENCE, PLEASE EXPLORE IRS FORM 5695 – RESIDENTIAL ENERGY CREDITS.**

**THE COMPANY THAT SOLD OR INSTALLED YOUR QUALIFYING UPGRADE WILL PROVIDE KEY TAX DATA AS WELL.**

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**PLEASE NOTE THAT THIS FORM DOES NOT NEED TO BE SUBMITTED WITH YOUR TAX DOCUMENTS AS LONG AS YOU SHARE ALL REQUIRED MORTGAGE AND PROPERTY TAX DETAILS.**

**THANK YOU!**