

**REAL ESTATE TAX EXPENSE**

Real estate taxes - principal residence (tax only) \_\_\_\_\_  
Penalty & interest put that amount here: \_\_\_\_\_  
PA residence: School Taxes: \_\_\_\_\_  
Real estate taxes - 2nd home \_\_\_\_\_  
Ground Rent \_\_\_\_\_  
Personal Property Tax \_\_\_\_\_  
other: \_\_\_\_\_

**INTEREST EXPENSE**

Taxpayer must be legally liable for the loan or is the legal or equitable owner of the real estate.  
Fair Market Value of the Property \_\_\_\_\_  
Mortgage Balance 12/31 \_\_\_\_\_  
If Mortgage Debt is greater than FMV of property then deductibility is limited  
Is your mortgage more than \$1,000,000 Yes No  
Are you a first time homebuyer? Yes No  
**Purchase or Sell House (bring in settlement sheet)**  
Principal residence mortgage interest \_\_\_\_\_  
Second residence mortgage interest \_\_\_\_\_  
Boat / RV mortgage interest (must have sleeping, cooking, toilet facilities) \_\_\_\_\_  
Home equity loan interest \_\_\_\_\_  
Did your Home Equity Loan exceed \$100,000 this year? Yes No

**Mortgage Insurance Premium (Contract started in 2007) (Guarantee Fee or Funding Fee)**  
AGI is in excess of \$100,000 (lose 10% of insurance for ea \$1,000) max \$109,000  
Principal Residence Only \_\_\_\_\_

**Refinance (bring in settlement sheet)**  
Date Refinanced: \_\_\_\_\_  
# of Years of New Loan: \_\_\_\_\_  
Was the Refinance used to buy, build or remodel the house? Yes No

Mortgage(s) paid to individual(s):  
Amount \_\_\_\_\_  
Name \_\_\_\_\_  
Address \_\_\_\_\_  
Social Security # \_\_\_\_\_