

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 _____

ZEPHYR ASSOCIATES, INC.

99073 PINION RIDGE RD, INYOKERN, CA 93527-3234
 TEL 559-850-4400 FAX 877-285-1055 E-Mail: zephyrtax@earthlink.net

v 12/31/10

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 _____

