

8181

☐ VOID☐ CORRECTED**Mortgage
Interest
Statement**

RECIPIENT'S/LENDER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.				OMB No. 1545-1380	
				Form 1098	
				(Rev. April 2025)	
				For calendar year _____	
		1 Mortgage interest received from payer(s)/borrower(s)		Copy A For Internal Revenue Service Center For filing information, Privacy Act, and Paperwork Reduction Act Notice, see the General Instructions for Certain Information Returns. www.irs.gov/Form1099	
		\$			
RECIPIENT'S/LENDER'S TIN	PAYER'S/BORROWER'S TIN	2 Outstanding mortgage principal	3 Mortgage origination date		
		\$			
		4 Refund of overpaid interest	5 Mortgage insurance premiums		
PAYER'S/BORROWER'S name		\$	\$		
		6 Points paid on purchase of principal residence			
		\$			
Street address (including apt. no.)		7 <input type="checkbox"/> If address of property securing mortgage is the same as PAYER'S/BORROWER'S address, check the box, or enter the address or description in box 8.			
City or town, state or province, country, and ZIP or foreign postal code		8 Address or description of property securing mortgage (see instructions)			
9 Number of properties securing the mortgage	10 Other				
Account number (see instructions)					
				11 Mortgage acquisition date	

Form **1098** (Rev. 4-2025)

Cat. No. 14402K

www.irs.gov/Form1098

Department of the Treasury - Internal Revenue Service

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PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.			Applicable checkbox on Form 8949		OMB No. 1545-0715		Proceeds From Broker and Barter Exchange Transactions	
					2025 Form 1099-B			
			1a Description of property (Example: 100 sh. XYZ Co.)				Copy A For Internal Revenue Service Center For filing information, Privacy Act, and Paperwork Reduction Act Notice, see the General Instructions for Certain Information Returns. www.irs.gov/Form1099	
			1b Date acquired		1c Date sold or disposed			
PAYER'S TIN		RECIPIENT'S TIN		1d Proceeds		1e Cost or other basis		
				\$		\$		
				1f Accrued market discount		1g Wash sale loss disallowed		
				\$		\$		
RECIPIENT'S name			2 Short-term gain or loss <input type="checkbox"/>		3 Check if proceeds from:			
			Long-term gain or loss <input type="checkbox"/>		Collectibles <input type="checkbox"/>			
			Ordinary <input type="checkbox"/>		QOF <input type="checkbox"/>			
Street address (including apt. no.)			4 Federal income tax withheld		5 Check if noncovered security <input type="checkbox"/>			
			\$					
City or town, state or province, country, and ZIP or foreign postal code			6 Reported to IRS:		7 Check if loss is not allowed based on amount in 1d <input type="checkbox"/>			
			Gross proceeds <input type="checkbox"/>					
			Net proceeds <input type="checkbox"/>					
Account number (see instructions)		2nd TIN not.	8 Profit or (loss) realized in 2025 on closed contracts		9 Unrealized profit or (loss) on open contracts—12/31/2024			
		<input type="checkbox"/>	\$		\$			
CUSIP number		FATCA filing requirement <input type="checkbox"/>	10 Unrealized profit or (loss) on open contracts—12/31/2025		11 Aggregate profit or (loss) on contracts			
			\$		\$			
14 State name	15 State identification no.	16 State tax withheld	12 Check if basis reported to IRS <input type="checkbox"/>		13 Bartering			
		\$	\$		\$			

Form **1099-B**

Cat. No. 14411V

www.irs.gov/Form1099B

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				\$		\$		
				1f Accrued market discount		1g Wash sale loss disallowed		
				\$		\$		
RECIPIENT'S name			2 Short-term gain or loss <input type="checkbox"/>		3 Check if proceeds from:			
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			\$					
City or town, state or province, country, and ZIP or foreign postal code			6 Reported to IRS:		7 Check if loss is not allowed based on amount in 1d <input type="checkbox"/>			
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Account number (see instructions)		2nd TIN not. <input type="checkbox"/>	8 Profit or (loss) realized in 2025 on closed contracts		9 Unrealized profit or (loss) on open contracts—12/31/2024			
			\$		\$			
CUSIP number		FATCA filing requirement <input type="checkbox"/>	10 Unrealized profit or (loss) on open contracts—12/31/2025		11 Aggregate profit or (loss) on contracts			
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14 State name	15 State identification no.	16 State tax withheld	12 Check if basis reported to IRS <input type="checkbox"/>		13 Bartering			
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PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.		1a Total ordinary dividends		OMB No. 1545-0110	
		\$		Form 1099-DIV	
		1b Qualified dividends		(Rev. January 2024)	
		\$		For calendar year	
		2a Total capital gain distr.		2b Unrecap. Sec. 1250 gain	
		\$		\$	
PAYER'S TIN	RECIPIENT'S TIN	2c Section 1202 gain		2d Collectibles (28%) gain	
		\$		\$	
		2e Section 897 ordinary dividends		2f Section 897 capital gain	
		\$		\$	
RECIPIENT'S name		3 Nondividend distributions		4 Federal income tax withheld	
		\$		\$	
Street address (including apt. no.)		5 Section 199A dividends		6 Investment expenses	
		\$		\$	
City or town, state or province, country, and ZIP or foreign postal code		7 Foreign tax paid		8 Foreign country or U.S. possession	
		\$			
		9 Cash liquidation distributions		10 Noncash liquidation distributions	
		\$		\$	
		11 FATCA filing requirement		12 Exempt-interest dividends	
		<input type="checkbox"/>		\$	
Account number (see instructions)		2nd TIN not.		13 Specified private activity bond interest dividends	
		<input type="checkbox"/>		\$	
		14 State		15 State identification no.	
				16 State tax withheld	
				\$	
				\$	

Dividends and Distributions

Copy A
For
Internal Revenue
Service Center

File with Form 1096.

For Privacy Act
and Paperwork
Reduction Act
Notice, see the
current General
Instructions for
Certain
Information
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