

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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☐ VOID☐ CORRECTED

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. <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			
			\$		\$			
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**

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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
Returns.

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☐ 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

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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

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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	

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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"/>		\$	
		13 Specified private activity bond interest dividends		\$	
Account number (see instructions)		2nd TIN not.		14 State	
		<input type="checkbox"/>		15 State identification no.	
				16 State tax withheld	
				\$	
				\$	

Dividends and Distributions

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

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.		Payer's RTN (optional)		OMB No. 1545-0112	
		1 Interest income \$		Form 1099-INT (Rev. January 2024)	
				For calendar year _____	
PAYER'S TIN		RECIPIENT'S TIN		2 Early withdrawal penalty \$	
				3 Interest on U.S. Savings Bonds and Treasury obligations \$	
RECIPIENT'S name		4 Federal income tax withheld \$		5 Investment expenses \$	
		6 Foreign tax paid \$		7 Foreign country or U.S. territory	
Street address (including apt. no.)		8 Tax-exempt interest \$		9 Specified private activity bond interest \$	
		10 Market discount \$		11 Bond premium \$	
City or town, state or province, country, and ZIP or foreign postal code		FATCA filing requirement <input type="checkbox"/>		12 Bond premium on Treasury obligations \$	
		13 Bond premium on tax-exempt bond \$			
Account number (see instructions)		2nd TIN not. <input type="checkbox"/>	14 Tax-exempt and tax credit bond CUSIP no.	15 State	16 State identification no.
					17 State tax withheld \$

Interest
Income

Copy A

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and Paperwork
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