

Complete this section if you have home acquisition/improvement debt over \$1,000,000 or home equity debt over \$100,000.

Mortgages taken out before 10/14/87 generally qualify as grandfather debt regardless of how the proceeds are used.

Home acquisition debt is a mortgage taken out after 10/13/87, the proceeds of which are used to buy, build or substantially improve your home.

Home equity debt is a mortgage taken out after 10/13/87, the proceeds of which are NOT used to buy, build, or substantially improve your home.

	2016 Information	Prior Year Information
Description of loan/property _____	[2]	
Taxpayer/Spouse/Joint (T, S, J) _____	[3]	
Loan origination date _____	[4]	
Fair market value of home + _____	[5]	
Number of months loan was outstanding in 2016, if not 12 _____	[7]	
Number of months home was a qualifying home _____ (If different from number of months loan was outstanding)	[9]	
Principal paid in 2016 + _____	[11]	
Interest paid during 2016 + _____	[13]	
Points reported on Form 1098 for 2016 + _____	[15]	
Home mortgage interest you paid, not reported on Form 1098:		
Recipient name _____	[18]	
Recipient SSN or EIN _____	[19]	
Recipient address _____	[20]	
Recipient city, state, zip code _____ [21] _____ [22] _____	[23]	
Grandfather debt as of 12/31/15 (or first day mortgage was outstanding) + _____	[24]	
Grandfather debt as of 12/31/16 (or last day mortgage was outstanding) + _____	[26]	
Home acquisition/improvement debt as of 12/31/15 (or first day mortgage was outstanding)+ _____	[28]	
Home acquisition/improvement debt as of 12/31/16 (or last day mortgage was outstanding) + _____	[30]	
Home equity debt as of 12/31/15 (or first day mortgage was outstanding) + _____	[32]	
Home equity debt as of 12/31/16 (or last day mortgage was outstanding) + _____	[34]	
Average balance in 2016 of grandfather debt + _____	[37]	
Average balance in 2016 of home acquisition/improvement debt + _____	[39]	
Average balance for 2016 all types of debt + _____	[41]	

**NOTES/QUESTIONS:**