



Annual Tax and Interest Statement

JPMorgan Chase Bank, N.A.  
 Mail Code LA4-6396  
 700 Kansas Lane  
 Monroe, LA 71203

Loan Number 1148558404  
 Statement Date 12/31/2021  
 Tax Year 2021  
 Property Address 4141 SYKES ST  
 CARY NC 27519

**Principal Activity**  
 Beginning Balance \$265,718.00  
 Amount Paid \$265,718.00  
 Ending Balance \$0.00

**Escrow Activity**  
 Beginning Escrow Balance \$0.00  
 Deposits \$3,430.60  
 Disbursements:  
 Homeowners Insurance Paid \$0.00  
 Mortgage Insurance Paid \$265.74  
 Real Estate Taxes Paid \$0.00  
 Additional Assessments Paid \$0.00  
 Escrow Refund \$3,164.86  
 Ending Escrow Balance \$0.00



70838 YSZ Z 06521 C -  
 LISA SUZANNE MONTEZ  
 1209 CATCH FLY LN  
 DURHAM NC 27713-2557

1098Z

CORRECTED (if checked)

RECIPIENT'S/LENDER'S name, street address, city or town, state or province, county, ZIP or foreign postal code, and telephone no.  JPMorgan Chase Bank, N.A. Mail Code LA4-6396 700 Kansas Lane Monroe, LA 71203 PHONE: 1-800-848-9136		*Caution: The amount shown may not be fully deductible by you. Limits based on the loan amount and the cost and value of the secured property may apply. Also, you may only deduct interest to the extent it was incurred by you, actually paid by you, and not reimbursed by another person.	OMB No. 1545-1380  <b>2021</b>  Form 1098	<b>Mortgage Interest Statement</b>  <b>Copy B For Payer/Borrower</b>  The information in boxes 1 through 9 and 11 is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if the IRS determines that an underpayment of tax results because you overstated a deduction for this mortgage interest or for these points, reported in boxes 1 and 6; or because you didn't report the refund of interest (box 4); or because you claimed a nondeductible item.
RECIPIENT'S/LENDER'S TIN 13-4994650		PAYER'S/BORROWER'S TIN ***-**-8385		
PAYER'S/BORROWER'S name LISA SUZANNE MONTEZ		1 Mortgage interest received from payer(s)/borrower(s) \$ 3,351.19	3 Mortgage origination date 03/13/2021	
Street address (including apt. no.) 1209 CATCH FLY LN		2 Outstanding mortgage principal \$ 265,718.00	5 Mortgage insurance premiums \$ 265.74	
City or town, state or province, country, and ZIP or foreign postal code DURHAM NC 27713-2557		4 Refund of overpaid interest \$ 0.00	6 Points paid on purchase of principal residence \$ 0.00	
9 Number of properties securing the mortgage 1		7 <input type="checkbox"/> If address of property securing mortgage is the same as PAYER'S/BORROWER'S address, the box is checked, or the address or description is entered in box 8.  8 Address or description of property securing mortgage (see instructions)  4141 SYKES ST CARY NC 27519		
Account number (see instructions) 1148558404		11 Mortgage acquisition date 05/01/2021		

Form 1098 (keep for your records) www.irs.gov/Form1098 Department of the Treasury - Internal Revenue Service

**Please Note:**

**COVID-19 Assistance: Delayed Payments**

Delayed payments under COVID-19 Assistance may impact the amount of mortgage interest shown on your IRS Form 1098. See FAQs on the back for more information.

Your interest may be overstated in Box 1 if all or a portion of your payments are subsidized by a state-funded program. Contact your tax advisor with questions.

Esta comunicación contiene información importante acerca de la cuenta. Si tiene alguna pregunta o necesita ayuda para traducirla, comuníquese con nosotros llamando al 1-800-848-9136.

This statement shows the Real Estate Taxes Chase paid from your escrow account. Further Real Estate Tax questions? See [www.Chase.com/PrepayTaxesFAQ](http://www.Chase.com/PrepayTaxesFAQ)

**Additional Amounts**

Real Estate Taxes Paid \$0.00

**Resources**

Tax Forms are available for the primary borrower and coborrower to view, download, and print at [www.chase.com/TaxStatement](http://www.chase.com/TaxStatement)

PHONE: 1-800-848-9136  
 we accept operator relay calls

Customer Service Inquiries:  
 Chase  
 Mail Code LA4-6475  
 700 Kansas Lane  
 Monroe, LA 71203

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