

REPRESENTATION OF PRINTED DOCUMENT

IMPORTANT TAX RETURN INFORMATION BELOW

P.O. Box 8068 | Virginia Beach, VA 23450 | 1.800.509.0183

7-754-01621-0016486-001-000-000-000-000

AJAY B KORITALA **SOWMYA VUNNAM** 916 MEADOW GUST DR HASLET TX 76052-1357 **ACCOUNT NUMBER: 0061687562**

FOR INFORMATION CALL: 1.800.509.0183

YEAR: 2023

CUSTOMER SERVICE HOURS: Monday - Friday: 8 a.m. to 9 p.m. ET Saturday: 8 a.m. to 3 p.m. ET

SEE REVERSE SIDE FOR ADDITIONAL INFORMATION

ANNUAL TAX AND INTEREST STATEMENT

AJAY B KORITALA SOWMYA VUNNAM 916 MEADOW GUST DR HASLET TX 76052-1357

Lakeview Loan Servicing, LLC P.O. Box 8068

Virginia Beach, VA 23450

ACCT #: 0061687562 SSN: **-**-2577

TIN# 54-1322898

DISBURSEMENTS FROM ESCROW

PRINCIPAL RECONCILIATION

ESCROW RECONCILIATION

PROPERTY TAX \$10,192.28 HAZARD INSURANCE MORTGAGE INSURANCE **ESCROW REFUND**

CURRENT TOTAL PYMT

\$1,440.00 \$0.00 \$2,281.17

BEG BAL \$424,747.94 APPLIED PRIN \$65,383.45 \$359 364 49 FNDING BAI

BEG BAL \$4,805.34 **DEPOSITS** \$15,145.00 DISBURSEMENTS

\$13,913,45 **ENDING BAL** \$6,036.89

ADDT'L ASSESSMENTS

CURRENT ESCROW PYMT \$1,262.08

\$3.351.93

INTEREST RECONCILIATION

INTEREST PAID \$0.00 \$15,714.35

*MORTGAGE INTEREST RECEIVED FROM PAYER(S)/BORROWERS(S)

CORRECTED (if checked) *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. 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 Mortgage $\mathsf{Form}\,1098$ LoanCare, LLC Interest (Rev. January 2022) P.O. Box 8068 Statement For calendar year Virginia Beach, VA 23450 2023 (800) 274-6600 Copy B For Payer/ Borrower 1 Mortgage interest rece er(s)/borrower(s) 15,714.35 PAYER'S/BORROWER'S name, street address (including apt. no.), city or town, state or province, country, and ZIP or foreign postal code Borrower
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. \$ 424.747.94 07/08/22 4 Refund of overpaid interest 5 Mortgage insurance premiums \$ 0.00 7 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 6 Points paid on purchase of principal residence AJAY B KORITALA SOWMYA VUNNAM \$ 0.00 red in box 8. 916 MEADOW GUST DR HASLET TX 76052-1357 8 Address or description of property securing mortgage 916 MEADOW GUST DRIVE HASLET TX 76052 9 Number of properties securing the mortgage 10 Other Real Estate Taxes Paid \$10,192.28 01 1 Mortgage acquisition of 0061687562 RECIPIENT'S/LENDER'S TIN PAYER'S/BORROWER'S TIN ***-**-2577 54-1322898

Form 1098 (Rev. 1-2022)

(Keep for your records)

www.irs.gov/Form1098

Department of the Treasury - Internal Revenue Service

REPRESENTATION OF PRINTED DOCUMENT

IMPORTANT STATE DISCLOSURES SEE IMPORTANT DISCLOSURES BELOW

Important notice for those with a mortgage loan on real estate located in Texas: COMPLAINTS REGARDING THE SERVICING OF YOUR MORTGAGE SHOULD BE SENT TO THE DEPARTMENT OF SAVINGS AND MORTGAGE LENDING, 2601 NORTH LAMAR, SUITE 201, AUSTIN, TX 78705. A TOLLFREE CONSUMER HOTLINE IS AVAILABLE AT 877-276-5550.

A complaint form and instructions may be downloaded and printed from the Department's website located at www.sml.texas.gov or obtained from the department upon request by mail at the address above, by telephone at its toll-free consumer hotline listed above, or by email at sml.texas.gov.

Instructions for Payer/Borrower

A person (including a financial institution, a governmental unit, and a cooperative housing corporation) who is engaged in a trade or business and, in the course of such trade or business, received from you at least \$600 of mortgage interest (including certain points) on any one mortgage in the calendar year must furnish this statement to you.

If you received this statement as the payer of record on a mortgage on which there are other borrowers, furnish each of the other borrowers with information about the proper distribution of amounts reported on this form. Each borrower is entitled to deduct only the amount each borrower paid and points paid by the seller that represent each borrower's share of the amount allowable as a deduction. Each borrower may have to include in income a share of any amount reported in box 4.

If your mortgage payments were subsidized by a government agency, you may not be able to deduct the amount of the subsidy. See the instructions for Schedule A, C, or E (Form 1040) for how to report the mortgage interest. Also, for more information, see Pub. 936 and Pub. 535.

Payer's/Borrower's taxpayer identification number (TIN). For your protection, this form may show only the last four digits of your TIN (SSN, ITIN, ATIN, or EIN). However, the issuer has reported your complete TIN to the IRS.

Account number. May show an account or other unique number the lender has assigned to distinguish your account.

Box 1. Shows the mortgage interest received by the recipient/lender during the year. This amount includes interest on any obligation secured by real property, including a mortgage, home equity loan, or line of credit. This amount does not include points, government subsidy payments, or seller payments on a "buydown" mortgage. Such amounts are deductible by you only in certain circumstances.



If you prepaid interest in the calendar year that accrued in full by January 15, of the subsequent year, this prepaid interest may be included in box 1. However you cannot deduct the prepaid amount in the calendar year paid even though it may be included in box 1.

8396. If the interest was paid on a mortgage, home equity loan, or line of credit secured by a qualified residence, you can only deduct the interest paid on acquisition indebtedness, and you may be subject to a deduction limitation.

- **Box 2.** Shows the outstanding principal on the mortgage as of January 1 of the calendar year. If the mortgage originated in the calendar year, shows the mortgage principal as of the date of origination. If the recipient/lender acquired the loan in the calendar year, shows the mortgage principal as of the date of acquisition.
- **Box 3.** Shows the date of the mortgage origination.
- Box 4. Do not deduct this amount. It is a refund (or credit) for overpayment(s) of interest you made in a prior year or years. If you itemized deductions in the year(s) you paid the interest, you may have to include part or all of the box 4 amount on the "Other income" line of your calendar year Schedule 1 (Form 1040). No adjustment to your prior year(s) tax return(s) is necessary. For more information, see Pub. 936 and Itemized Deduction Recoveries in Pub. 525.
- **Box 5.** If an amount is reported in this box, it may qualify to be treated as deductible mortgage interest. See the calendar year Schedule A (Form 1040) instructions and Pub. 936.
- Box 6. Not all points are reportable to you. Box 6 shows points you or the seller paid this year for the purchase of your principal residence that are required to be reported to you. Generally, these points are fully deductible in the year paid, but you must subtract seller-paid points from the basis of your residence. Other points not reported in box 6 may also be deductible. See Pub. 936 to figure the amount you can deduct.
- **Box 7.** If the address of the property securing the mortgage is the same as the payer's/borrower's, either the box has been checked, or box 8 has been completed.
- Box 8. Shows the address or description of the property securing the mortgage.
- **Box 9.** If more than one property secures the loan, shows the number of properties securing the mortgage. If only one property secures the loan, this box may be blank.
- **Box 10.** The interest recipient may use this box to give you other information, such as real estate taxes or insurance paid from escrow.
- Box 11. If the recipient/lender acquired the mortgage in the calendar year, shows the date of

Future developments. For the latest information about developments related to Form 1098 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/Form1098.

Free File. Go to www.irs.gov/FreeFile to see if you qualify for no-cost online federal tax preparation, e-filing, and direct deposit or payment options.

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