

[Your Name]
[Your Address]
[City, State, Zip Code]
[Phone Number]
[Email Address]

[Date]

[Lender Name]
[Lender Address]
[City, State, Zip Code]

RE: Request for Mortgage Interest Statement (Form 1098)

Account Number: [Your Loan Account Number]

Property Address: [Address of the Home Purchased]

To Whom It May Concern,

I am writing to request the necessary tax documentation regarding the mortgage for my home purchased on [Date of Purchase].

As a recent homebuyer, I am preparing my tax return and require the **Form 1098 (Mortgage Interest Statement)** for the tax year [Year]. Please ensure the statement includes the following information:

- Total mortgage interest paid during the year.
- Points paid on the purchase of the principal residence (if applicable).
- Mortgage insurance premiums paid (if applicable).
- Real estate taxes paid from escrow.

If this document has already been mailed, please let me know the date it was sent. If it is available digitally, please provide instructions on how to access it through your online portal.

Thank you for your prompt assistance in this matter.

Sincerely,

[Your Signature]

[Your Printed Name]