

# New Homeowner Tax Deduction Requirements Checklist

Dear [Homeowner's Name],

Congratulations on your new home! To ensure you take full advantage of your tax deductions, please review the following checklist:

- **Documentation Required:**
  - Mortgage interest statements (Form 1098)
  - Property tax records
  - Closing statement (HUD-1 or Closing Disclosure)
  - Receipts for home improvements (if applicable)
  - Form 1040 with Schedule A (for itemization)
- **Eligibility Criteria:**
  - Property must be your primary residence.
  - Mortgage must be secured by the home.
  - Home improvements must be capitalized for deduction.
- **Additional Considerations:**
  - Check for local and state tax deductions.
  - Review any first-time homebuyer tax credits.

If you have any questions or need assistance, feel free to contact us.

Sincerely,  
[Your Name]  
[Your Company/Organization]  
[Contact Information]