

Sale of Property/Home Worksheet

Please complete this worksheet to help us determine whether you had a taxable gain on your sale of property/home

Address of property/home sold:	City	State	Zip
--------------------------------	------	-------	-----

How did you acquire this property/home?	Purchase / Gift / Inherit
---	---------------------------

Date property/home was purchased or acquired	
--	--

Purchase price of property/home	\$
---------------------------------	----

Purchase expenses Expenses or closing costs at time of purchase Expenses include miscellaneous fees, realtor costs, other	\$
---	----

Cost of capital improvements Any amounts spent on renovation or improvements that are still part of the property/home when the property/home is sold, but not costs for minor repairs or maintenance	\$
---	----

Date property/home was sold	
-----------------------------	--

Selling price of property/home	\$
--------------------------------	----

Selling expenses Expenses or closing costs at time of sale Expenses include miscellaneous fees, realtor costs, other	\$
--	----

Was this property/home used for business or rental?	Yes / No
---	----------

Did you receive a 1099-S for this transaction? If yes, please provide the 1099-S	Yes / No
---	----------

Who owned this property/home at the time of this sale?
--