

Sale of Home

Name _____ Social Security Number _____

Enter the date you purchased the home	
Enter the date you sold the home	
Enter the purchase price of your old home	
Seller-paid points for old home if bought after 1990	
Enter the selling price of the old home	
Enter any expenses from the sale of the old home	
Settlement fees or closing costs for old home	
Abstract and recording fees	
Legal fees	
Surveys	
Title insurance	
Amounts the seller owed that you agree to pay	
Other fees or closing cost	
Cost of capital improvements to old home (New Roof, Deck, Fence, Windows, Door, Upgrades to wiring, Plumbing, Insulation, New appliances)	
Special tax assessments paid on old home for local improvements, such as streets	
Other Increases to basis	
Describe	
Information on time lived in the home sold	You Spouse
Enter the date you first used the property as a main home	
Enter the date you first owned the property as a main home	
Have you excluded gain from the sale of another home during the 2-year period ending on the date of this sale?	Y / N Y / N
If YES, answer the following: Enter date of most recent sale of another home on which you excluded the gain	
Did the buyer assume your mortgage? Y / N Did the buyer assume any debts you owed? Y / N	
Have you claimed office use of home expenses on this home? Y / N <i>If yes, we will need prior year returns depreciation schedule, showing expenses taken.</i>	
Have you previously used this home as a rental property? Y / N <i>If yes, we will need you to provide us with a copy of the most recent depreciation schedule.</i>	

Please bring the contract for the sale of the home to your appointments