

Sale of Home/Property Organizer

Property address: _____

Please provide the purchase settlement, if you have it, and the sellers settlement form and 1099-S if received one with your documents.

Date property was purchased: _____ Purchase Price: \$ _____

Date property was sold: _____ Sale Price: \$ _____

Type of property sold (ex. land, home, condo) _____

Was the property considered your primary home? _____

If it was consider your primary home did you live in it for at least 2 years an done day?

If the property was not your primary home, was it either a secondary home or a rental sold? _____

Cost of improvements you made to the property during the time you owned it. **NOTE:** If a rental was sold do not list any capital improvements that were taken as improvements in prior years for the rental depreciation.

Capital Improvements

Description	Total Price	Date
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

NOTE: We advise that you keep the receipts for any capital improvements for your records in case they are every questioned and need to be substantiated with the tax year return that the sale happened in.