CODE- 4 TAX SERVICES

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PROPERTY SALE WORKSHEET

This form is designed to be used by any taxpayer who has sold a home, real estate, land or other investment property. Keep all receipts and documentation used to prepare this form in a safe location for 5-7 years. Please write legibly. Use separate sheet if needed.

Name(s):_____

Type of property: ☐ Primary Residence:

Dates of Primary Residence from _____ to _____

☐ Second Home

☐ Rental/investment property

☐ Raw Land

☐ Other:_____

Property Address:_____

Was this property inherited? ☐ Yes ☐ No

Date Property was originally purchased/inherited: _____

Date Property was sold: _____

Original Purchase Price or appraised value at time of inheritance: $_____

(include purchase closing costs statement with worksheet)

Cost of Improvements/Additions/Remodels: $_____

Sale Price: $_____

Selling Expenses: $_____

(include copy of closing costs statement with worksheet)

Other information:

_____

_____

_____

_____

_____