

SPECIALTY WORK SHEET for SALE OF PROPERTY

In order to maximize deductions, please complete this form.

CLIENT _____

TAX YEAR _____

Please bring in **CLOSING STATEMENT** for when you **PURCHASED** property.

Please bring in **CLOSING STATEMENT** for when you **SOLD** property.

Type of property sold: _____ Was property ever used as rental property Yes No

Location of Property sold: _____

Date Sold: _____

SALE PRICE: \$ _____

Date Purchased: _____

PURCHASED PRICE: \$ _____

ADDITIONAL PURCHASE COSTS:

Credit Report \$ _____
Escrow Fee _____
Legal Fees _____
Loan Fees _____
Notary Fee _____

Reconveyance Fee \$ _____
Recording Document .. _____
Termite Report _____
Title Policy _____
..... _____

IMPROVEMENT COSTS:

Air Conditioner \$ _____
Carpeting _____
Drapes _____
Electrical _____
Fences _____
Fixtures _____
Floor Improvements .. _____
Garage _____
Heating _____
Insulation _____

Landscaping _____
Patio _____
Plumbing _____
Remodeling _____
Roof Improvements .. _____
Walks _____
..... _____
..... _____
..... _____

SELLING EXPENSES:

Credit Report _____
Escrow _____
Legal Fees _____
Loan Fees _____
Notary Fee _____
Realtor's Commission .. _____

Reconveyance Fee .. _____
Recording Document .. _____
Termite Report _____
Title Policy _____
..... _____
..... _____

FIXING UP EXPENSES (Last 90 days):

Electrical _____
Glass and Screens _____
Paint _____
Plumbing _____

TOTAL COST: \$ _____

\$ NET GAIN: \$ _____

If property was sold on contract: Down Payment at time of sale: \$ _____
Contact balance on 12/31 \$ _____

Was the property sold your principal residence in 2 of the last 5 years? Yes _____ No _____

Was the property sold used as a home/office in year sale? Yes _____ No _____

Amount of Description, if any, allow on property sold: _____

Have you ever differed any gain on the sale of exchange of a personal residence? Yes _____ No _____

Date: _____ Amount of previous gain: \$ _____

I DECLARE THIS TO BE TRUE, COMPLETE AND CORRECT DOCUMENT

TAXPAYER'S SIGNATURE: _____

DATE: _____