



Sale of Home Worksheet

Referral Name: _____

Tax Year: _____

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When Complete: Press 'CTRL + S' or 'Command + S' to select the save location of the completed worksheet.

Part 1: Basic Information				
Taxpayer Name				
Property Address				
City		State		Zip
Original Purchase Date				
Original Purchase Price				
Total of Acquisition Costs (These are costs to add to your basis. Ex: Title Fees, Recording Fees, Commissions, etc.)				

Part 2: List of Improvements <i>Please list amounts paid and approximate dates for improvements. (i.e. kitchen/bath renovations, windows, landscaping that have not previously been expensed)</i>	
Improvement & Approx. Date	Amount Paid

Part 3: Extra Information	
Dates Taxpayer Lived in Home	
Dates Spouse Lived in Home (if Applicable)	
Was the Home Ever Fully/Partially Rented	
If So, Dates of Rental	
Date of Sale	
Sales Price	
Total of Sales Expense	
Individual Sales Expenses	