



Sale of Primary Residence / Investment Property

Taxpayer Name:

Social Security #:

Address of Property Sold:

City:

State:

Zip:

Date Home Was Acquired:

Date Home Was Sold:

Purchase Price:

Sale Price:

Capital Improvements:

Closing Cost (When purchased & sold)

Was the property sold your Primary Residence? Yes No

Did you live at the property 2 out of the last 5 years from the date of the sale?
(2 year period does not have to be consecutive) Yes No

If you said yes to both questions, you may be eligible for exclusion up to \$250,000 for a Single Return or up to \$500,000 for a Joint Return on the capital gains associated with the sale of home.

Was the property sold used as an Investment Property? Yes No

Was this a residential property? Yes No *If the property is both residential

Was this a commercial property? Yes No and commercial please provide a description below.

If property was rented please provide a depreciation schedule from your most recent return.

Any other details please elaborate below: