Taxpayer & Spouse: _____

SALE OF REAL PROPERTY

Please provide the information requested below. Please circle the applicable response where available in this document. If the question does not pertain to you please mark N/A. Unless indicated, all questions pertain to the _____ tax year. Please use separate sheets if more space is needed.

Please answer the questions below if the property you or your spouse own was used personally. Complete Module 9A if you or your spouse owned property that was used for rental purposes. Complete Module 10A if you or your spouse owned property that was used for rental or investment purposes as a trade or business.

1. Did you sell a principal residence during the year? Yes/no/na

   a. If yes, provide Form 1099-S (if applicable), a description of the property sold, the sales price, the closing statement, the date the property was sold, what you paid when the property was purchased by you, and when you purchased the property.

   b. If yes, did you own and live in it for two of the five years preceding the sale? Yes/no/na

      i. If your spouse is deceased, did the sale occur within two years of the date of death and did your spouse live in the home for at least two of the five years preceding the sale? Yes/no/na

   c. If yes, did you make any improvements since the property was purchased? Yes/no/na

i. If yes, provide the information in the table below.

Description	Date placed in service	Cost

   d. If yes, was the property sold subject to an installment sale or seller financed mortgage? Yes/no/na

      i. If yes, provide details.

2. Did you purchase a principal residence during the year? Yes/no/na

   a. If yes, did you or your spouse withdraw funds from your IRA to acquire a personal residence? Yes/no/na

Taxpayer Initials _____
Spouse's Initials _____

i. If yes, explain and provide Form 1099-R received.

3. Did you sell other real estate during the year that you did not receive rental proceeds for? Yes/no/na

   a. If yes, provide Form 1099-S (if applicable), a description of the property sold, the sale price, the closing statement, the date the property was sold, what you paid when the property was purchased by you, and when you purchased the property.

   b. If yes, what was the property used for?

   c. If yes, did you make any improvements since the property was purchased? Yes/no/na

      i. If yes, provide the information in the table below.

Description	Date placed in service	Cost

   d. If yes, was it sold subject to an installment sale or seller financed mortgage? Yes/no/na

      i. If yes, provide details.

CERTIFICATION

The undersigned certifies, to the best of his or her knowledge, that the information documented in and provided with this organizer is complete and accurate. The undersigned also certifies that he or she has provided the information requested herein. The undersigned additionally certifies that he or she has verified the information provided herein and states that it comports with the supporting documentation, if any.

_____ _____

Taxpayer's Signature Spouse's Signature

_____ _____

Taxpayer's Printed Name Spouse's Printed Name

Dated: Dated: