



**Loid Tax & Accounting, LLC**

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**Taxpayer:** \_\_\_\_\_

Address of home Sold: \_\_\_\_\_

Sale Price: \_\_\_\_\_ Please provide copy of closing statement.

Received 1099-S?  Yes  No

Primary residence for taxpayer for 2 out of the last 5 years the home was owned?  Yes  No

Primary residence for spouse for 2 out of the last 5 years the home was owned?  Yes  No

Did the taxpayer claim an exemption from capital gains on another home within the previous 2 years?  Yes  No

Did the spouse claim an exemption from capital gains on another home within the previous 2 years?  Yes  No

Was the home previously depreciated?  Yes  No

**Basis of Home Sold:**

Original Purchase price of Home: \_\_\_\_\_

**Improvements** (Improvements are items that enlarge or additions or extend the useful life of the home)

Description	Amount
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

I/We believe that the information disclosed in this organizer to be complete & accurate. I /We understand that incorrect or incomplete information may result in an erroneous return

_____ Taxpayer	_____ Date	_____ Spouse	_____ Date
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