



Loid Tax & Accounting, LLC

www.loidcpa.com
Email: todd@loidcpa.com
Office: 941-358-8275
Mobile: 941-928-8285

Taxpayer: _____

Address of home Sold: _____

Sale Price: _____ Please provide copy of closing statement.

Date Home was Acquired: ____/____/____ Date Home was Sold: ____/____/____

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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