

**CAPITAL GAINS AND LOSSES**

**Sale of Property / Real Estate / Stocks / Bonds / Etc.**

Furnish the information outlined below, enclose statements from brokers on purchases and sales of stock or commodities, real estate transaction papers, selling expenses, and Form 1099-S.

UNITS	Name of stock or property description	DATES		AMOUNTS	
		Acquired	Sold	Sales Price	Purchase Price
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					

**Installment Sales:**

- If anything above was sold on the installment basis, list line number: # \_\_\_\_\_
- If so, how much did you receive on the principal during the year? \$ \_\_\_\_\_
- How much (if any) was received on principal on a prior year's installment sale? \$ \_\_\_\_\_
- List all interest received from installment sales on previous page with Interest Income.

\* If new installment sale, also report selling expenses, mortgage assumed, and, if used in business, accumulated depreciation.

**SOCIAL SECURITY**

Use amount reported on Social Security Benefit Statement (SSA-1099)	Husband	Wife	Cash Received	Medicare Paid	Total

Enclose SSA-1099

**SALE OF PERSONAL RESIDENCE**

- Date old residence acquired: \_\_\_\_\_ Cost or basis: \_\_\_\_\_
- Improvements (additions, landscaping, driveway, new roof, etc.): \_\_\_\_\_
- Fixing-up expenses (painting, repairs, etc. to prepare for sale): \_\_\_\_\_
- Date old residence sold: \_\_\_\_\_ Selling price: \_\_\_\_\_
- Expenses of sale (commissions, legal fees, points, stamps, etc.): \_\_\_\_\_
- Was any part of the residence rented or used for business? Yes \_\_\_ No \_\_\_
  - How many months out of the last 60 months before the sale date did you live in it as your principal place of residence? \_\_\_\_\_
  - If married, did both you and your spouse own the residence? Yes \_\_\_ No \_\_\_

**MISCELLANEOUS INCOME**

(Important to list even if not taxable, show losses in brackets) Amount

Alimony (Provide name and Soc. Sec. No. of payer)	
Child Support payments/assistance	
Jury duty (or other public service)	
Tips/gratuities (not reported on W-2)	
Prizes/awards/lottery winnings (explain)	
Commissions/bonuses (not reported on W-2)	
Pensions/annuities (furnish Form 1099-R or details)	
IRA/Keogh/SEP/SIMPLE distributions	
Veterans benefits/disability income	
Business/self-employment/farm/rental (furnish a schedule or details)	
Unemployment compensation	
Barbers and exchanges	
Scholarships and fellowships	
Workers' compensation/loss of time payments	
Other (explain):	

**DEDUCTIONS AND CREDITS**

Check the following deduction and credit lists carefully, and from your cancelled checks, paid invoices, or other records, determine your deductible expenditures during the past year. Enter the amount in the space provided after each deductible item. Also enter items you think are deductible which do not appear on the deduction lists so it can be determined whether they are allowable. Keep all paid receipts, contracts, and cancelled checks for these deductions at least three years after the due date for filing.

**IRA / KEOGH / SEP / SIMPLE RETIREMENT PLANS**

Covered by	Date	Regular		Roth	
		IRA	IRA	IRA	IRA
Taxpayer	Y / N	/ /	/ /	/ /	/ /
Spouse	Y / N	/ /	/ /	/ /	/ /

In date column show month, day and year you have or intend to deposit funds. (If various dates, enter "various". If amount not known and you want the maximum deduction, write MAX in appropriate column. Furnish details on roll-overs or withdrawals.)