

<b>SALE OF PERSONAL RESIDENCE</b>			
Purchase date of old residence		Cost or Basis of old residence	
Improvements (Additions, Landscaping, Driveway, New Roof, etc)			
Selling Expenses (fixing-up expenses - painting, repairs, etc to prepare for sale)			
Sale date of old residence		Selling Price	
Expense of Sale (Commissions, Legal Fees, Points, Stamps, etc)			
1. Was any part of residence rented during the year?		YES or NO	
2. Did you own and use the home as your principal residence for at least 2 of the last 5 years?		YES or NO	
3. Was the sale of residence due to a job transfer, medical, or unforeseen circumstance?		YES or NO	
4. Have you deferred a gain from the sale of a personal residence into the home sold? If so, please provide Form 2119 from tax return for year prior home sold.		YES or NO	
5. Was the residence used as a home office?		YES or NO	
6. Have you or spouse sold a principal residence within the last two years?		YES or NO	
7. Has either spouse died in the past two years?		YES or NO	
<b>NEW RESIDENCE</b>			
Purchase date of new residence (or construction began)			
Date new residence occupied		Cost of new residence	
**If married, do you and your spouse have the same proportionate interest in the new residence as in the old?			YES or NO
**Note: Capital gains tax laws allow exclusion of up to \$500,000 (joint), \$250,000 (Single/HH) of home sale gains.			
**Did either you or your spouse have NO ownership interest in a principal residence in the past three years prior to this purchase?			YES or NO
**Attach copy of real estate closing statements for both the sale and the purchase.**			