

## Sale Of Your Home

**Attach copies of your original purchase and current sale settlement sheets here.**

Complete if the sale of your home occurred in the current year (2006)

1) Was the sale amount of your residence \$250,000 or less Yes\_\_\_\_ No\_\_\_\_  
(\$500,000 or less if married filing a joint return)

2) a) Did **you** live in your home as a principal residence for a total Yes\_\_\_\_ No\_\_\_\_  
of at least 2 years during the 5-year period ending on the date  
of sale?

b) If married filing a joint return, did your **spouse** live in your Yes\_\_\_\_ No\_\_\_\_  
home as a principal residence for a total of at least 2 years during  
the 5-year period ending on the date of sale?

3) Did you receive a form 1099-5? Yes\_\_\_\_ No\_\_\_\_

4) a) Have **you** sold and excluded gain from another principal Yes\_\_\_\_ No\_\_\_\_  
residence within 2 years before the sale of this home?

b) If married filing a joint return , has your **spouse** sold and Yes\_\_\_\_ No\_\_\_\_  
excluded gain from another principal residence within 2 years  
before the sale of this home?

5) Did you sell this home due to a change of health, place of  
employment or other unforeseen circumstances? (If this is a joint  
sale, answer both questions the same. Otherwise, answer as  
applicable)

a) **You** Yes\_\_\_\_ No\_\_\_\_

b) Your **spouse** Yes\_\_\_\_ No\_\_\_\_

6) Did you or your spouse use any part of your residence for Yes\_\_\_\_ No\_\_\_\_  
business or rental purposes after May 6, 1997?

7) a) Will you be receiving periodic payments of principal or Yes\_\_\_\_ No\_\_\_\_  
interest  
from this sale?

b) If **yes**, what is the amount of the financial instrument?

\_\_\_\_\_

8) Address of former home sold

\_\_\_\_\_

\_\_\_\_\_

9) a) Date former home was sold \_\_\_\_\_

b) Date former home was bought \_\_\_\_\_

10) Sales price of the home sold \_\_\_\_\_

### **Cost Basis of the Home Sold**

#### **Description Amount**

##### **Original cost of home sold:**

11) a) Purchase price of home sold \_\_\_\_\_

b) Postponed gain on the sale of your previous home

\_\_\_\_\_  
(from Form 2119 for the year this home was bought)

##### **Additions and increases to basis:**

12) a) Settlement fees or closing costs when home was purchased \_\_\_\_\_  
**Do not** include amounts previously deducted as moving expenses

b) Cost of capital improvements \_\_\_\_\_

c) Additions. Including costs of materials and labor \_\_\_\_\_

d) Other additions and increases to basis \_\_\_\_\_

##### **Decreases to basis:**

13) a) Seller-paid points (for old home bought after 1990) \_\_\_\_\_

b) Other decreases to basis \_\_\_\_\_

### **Commissions and Other Expenses of Sale**

#### **Description**

#### **Amount**

14)	_____
a) _____	_____
b) _____	_____
c) _____	_____
d) _____	_____

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

b) \_\_\_\_\_

c) \_\_\_\_\_

d) \_\_\_\_\_