

**GENERAL INFORMATION**

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

Complete if the sale of your home occurred in the current year (2022).

- |  | Yes                      | No                       |
|--|--------------------------|--------------------------|
| 1 a Was the sale amount of your residence \$250,000 or less (\$500,000 or less if married filing a joint return)?  | <input type="checkbox"/> | <input type="checkbox"/> |
| b Did you acquire this home in a like-kind (Section 1031) exchange and sell it within 5 years of acquiring it?   | <input type="checkbox"/> | <input type="checkbox"/> |
| c Did you use this home partially or completely in a trade or business or hold it for investment <b>AND</b> dispose of it in a like-kind (Section 1031) exchange?                                      | <input type="checkbox"/> | <input type="checkbox"/> |
| d Did you claim the First-Time Homebuyer Credit when you purchased this home?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 a Did <b>you</b> live in your home as a principal residence for a total of at least 2 years during the 5-year period ending on the date of sale?   | <input type="checkbox"/> | <input type="checkbox"/> |
| b If married filing a joint return, did your <b>spouse</b> live in your home as a principal residence for a total of at least 2 years during the 5-year period ending on the date of sale?             | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 Did you receive a Form 1099-S?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 a Have <b>you</b> sold and excluded gain from another principal residence within 2 years before the sale of this home?   | <input type="checkbox"/> | <input type="checkbox"/> |
| b If married filing a joint return, has your <b>spouse</b> sold and excluded gain from another principal residence within 2 years before the sale of this home?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 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 <b>You</b>   | <input type="checkbox"/> | <input type="checkbox"/> |
| b Your <b>spouse</b>   | <input type="checkbox"/> | <input type="checkbox"/> |
| 6 a Did you or your spouse use any part of your residence for business or rental purposes after May 6, 1997?   | <input type="checkbox"/> | <input type="checkbox"/> |
| b Was the home used as investment or rental property after December 31, 2008?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 7 a Will you be receiving periodic payments of principal or interest from this sale?   | <input type="checkbox"/> | <input type="checkbox"/> |
| b If <b>Yes</b> , 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 HOME SOLD**

Description	Amount
<b>Original cost of home sold:</b>	
11 a Purchase price of home sold	
b Postponed gain on the sale of your previous home sold before May 7, 1997 (Form 2219 for the year this home was bought)	
<b>Additions and increases to basis:</b>	
12 a Settlement fees or closing costs when home was purchased. <b>Do not</b> 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	
<b>Decreases to basis:</b>	
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 _____	