

# Worksheet - Sale of Real Estate

Client Name:

Property address:

Date purchased:

Date sold:

## OWNER INFORMATION

Name	Ownership (%)	Address
	%	
	%	
	%	
	%	

## QUESTIONNAIRE

1) Was this property used as your principal residence for the entire period owned?

2) Was this property ever used to earn rental income, in part or in whole, at any time during the period owned?

If yes, please provide details as to whether it was rented on a short or long term basis.

3) Were there any changes to the property that we should be made aware of?

If yes, please provide us with the details below.

## SUPPORTING DOCUMENTS NEEDED

Included?	Description
<input type="text" value="Yes or No"/>	1) Sale documents - please include a complete copy of your original sale documents which would include statement of adjustments, order to pay, legal invoice, etc.
<input type="text" value="Yes or No"/>	2) Purchase documents - please include a complete copy of your original purchase documents which would include statement of adjustments, order to pay, legal invoice, etc.
<input type="text" value="Yes or No"/>	3) If the property was rented, in part or in whole, at any time during the period held, include the following documents: - Form T776, <i>Statement of Real Estate Rentals</i> , for all years - A listing of all capital improvements