



## REAL ESTATE CHECKLIST

You must report **any** property sold by you, or that you changed the use of, located any where in the world. Please note this is not limited to just Canadian property.

You **only** need to complete this checklist if you sold or changed the use of Real Estate in the calendar year. If you have had more than one transaction in the year, then please complete a separate sheet for each piece of Real Estate.

	Yes	No
<b>1) Did you sell Real Estate in the past year?</b> Real Estate includes homes, condominiums, apartments, vacant lots, co-op units, timeshare units		
<b>2) Did you transfer or gift some or all of the title to a piece of Real Estate?</b> For example: <ul style="list-style-type: none"> <li>Did you add someone to title?</li> <li>Did you take someone off title?</li> </ul>		
<b>3) Did you change how you used a piece of Real Estate?</b> Change in use means that you changed how you used the Real Estate. For example: <ul style="list-style-type: none"> <li>Changing from renting the property to owning the property as your principal residence.</li> <li>Changing from regular monthly rental, to a short term rental such as a bed and breakfast or an AirBNB</li> </ul>		

If you answered "Yes" to any of the questions above please provide the following information:

Your Name:	
Property Street Address:	
City:	
Province or State:	
Postal or Zip Code:	
Country:	
Date of Sale or Change:	

**For each property sold please answer the following questions:**

**Ownership Details**

	Yes	No
Were you the sole owner? If "No" please provide the following details:		
Number of other people, or Company(ies) on title:		
<ul style="list-style-type: none"> <li>Name #1: _____</li> <li>Name #2: _____</li> <li>Name #3: _____</li> </ul>		
If there are additional owners, then please add them to the Notes section below.		

**Sale Information** *(Please submit copies of the sale documents with this check list.)*

Date of Sale:		
Sale Price:		
Closing costs :		
Did you take a mortgage back from Purchaser?		
Did you sell the furnishings with the property?		

**Purchase Information** *(Please submit copies of the purchase documents with this checklist.)*

Year of Purchase:		
Amount Paid:		
Purchase currency:		
Did you do any major additions or renovations? If "Yes", then please provide details.		

**Principal Residence**

Have you ever live in the property that you sold?		
Did you occupy this property for the whole period of ownership?		
During the period of ownership, did you own and occupy, even for a period of time, any other property?		
Have you ever rented out the property? If "yes" please indicate when and for how long. _____ <b>Note:</b> If you lived in the house and rented out just a portion, then please indicate that. _____		

**NOTES**
