

CODE- 4 TAX SERVICES

MAILING ADDRESS: 22431 Antonio Parkway B160-482, Rancho Santa Margarita, CA 92688 * 949-364-2121 *
eleanor@code-4tax.com * Fax 877-794-9998 * www.code-4tax.com

PROPERTY SALE WORKSHEET

This form is designed to be used by any taxpayer who has sold a home, real estate, land or other investment property. Keep all receipts and documentation used to prepare this form in a safe location for 5-7 years. Please write legibly. Use separate sheet if needed.

Name(s): _____

Type of property: ☐ Primary Residence:
Dates of Primary Residence from _____ to _____
☐ Second Home
☐ Rental/investment property
☐ Raw Land
☐ Other: _____

Property Address: _____

Was this property inherited? ☐ Yes ☐ No

Date Property was originally purchased/inherited: _____

Date Property was sold: _____

Original Purchase Price or appraised value at time of inheritance: \$ _____
(include purchase closing costs statement with worksheet)

Cost of Improvements/Additions/Remodels: \$ _____

Sale Price: \$ _____

Selling Expenses: \$ _____

(include copy of closing costs statement with worksheet)

Other information:
