

Sale of Home Organizer - 2024

Taxpayer Name: _____

Please use this organizer to gather your information in helping me to prepare your tax return. Please answer all the questions and provide the documents requested in this organizer. Thank you!!

Date you purchased your previous home:	Date:
Purchase price of your previous home:	\$
Date you sold your previous home:	Date:
Selling price of the previous home:	\$
Did you pay any legal fees relating to the previous home? If yes, bring copies of all papers relating to the legal fees.	
Did you pay to have a survey done? If yes, please bring all papers relating to the survey.	\$
Did you pay any assessments on the previous home, such as: city improvements, sewer connections, sidewalks, etc? If so, please bring all papers relating to assessments.	\$
Did you claim office use of home expenses? If yes, please provide the depreciation schedules showing amount of depreciation claimed.	
Any improvements to the previous home, such as: replacement of doors/windows, new roof, new appliances, upgrades to wiring/plumbing, new deck or fencing, etc? If yes, please describe.	\$
Did you use the previous home as rental property? If yes, please provide the depreciation schedules showing amount of depreciation claimed.	
Did you claim any casualty or theft loss on the previous home? If yes, please describe and provide documentation of when you sustained the loss.	\$
Number of years you occupied the home in the last 5 years.	
Number of years you owned the home in the last 5 years.	
Have you sold another home in the last 2 years? If yes, what was the date you sold the other home?	
If you owned and occupied the previous home for fewer than 2 of the last 5 years, please explain why you sold this home in less than 2 years.	