

Sale of Stock Organizer - 2024

Taxpayer Name: _____

Please use this organizer to gather information in order to report the sale of stocks or bonds for the year. Please bring the following to your appointment:

- **Form 1099-B** (Proceeds from a broker and barter exchange transaction/s)
- **Year-end tax statement/s** (If your broker did not provide you with a year-end statement, or the information is incorrect/incomplete, you should contact your broker to request the correct information before your appointment.)

Broker Information – Please answer **YES** or **No** for each question

Company Name and Account Number	I have received a 1099B for this account	I have a year-end statement for this account	Cost-Basis Information is included on my year-end statement
	YES NO	YES NO	YES NO
	YES NO	YES NO	YES NO
	YES NO	YES NO	YES NO
	YES NO	YES NO	YES NO
	YES NO	YES NO	YES NO
	YES NO	YES NO	YES NO

If you managed your own investments, please provide us with the following information for all stock sales you made for the year.

Description of Stock Sold	Purchase Date	Purchase Price	Sales Date	Sales Price

If you reinvested dividend income, please include reinvested dividends in your cost basis.

Description of Reinvestments	Purchase Date	Purchase Price	Cost-Basis Information

Sale of Gifted, Inherited or Divorce Stock

If you received stock through a gift, inheritance, or divorce, then special rules apply for calculating cost basis. To assist me with calculating the cost basis, I will need you to provide the following information relating to the sale of these stocks. I also will need all statements from your broker showing the cost basis.

Sale of Stock Received as a Gift

Did you sell stock you received as a gift? YES NO				
If yes, you need to provide the following information for any gifted stock you sold during 2024.				
Description of Stock Sold	Date gifted by donor	Amount paid for stock by donor	Sales Date	Sales Price

Sale of Inherited Stock

Did you sell stock you received from an inheritance? YES NO				
If yes, you need to provide the following information for any inherited stock you sold during 2024.				
Description of Stock Sold	Date of death of decedent	Valuation of stock by estate (if any)	Sales Date	Sales Price

Sale of Stock Received in a Divorce

Did you sell stock you received through a divorce? YES NO				
If yes, you need to provide the following information for any stock you sold during 2024.				
Description of Stock Sold	Date stock was purchased by former spouse	Amount paid for stock by former spouse	Sales Date	Sales Price