

Home sale details:

When filing Married Filing Separately, only enter your portion of the amounts below.

Was a Form 1099-S issued? Yes No

Was a Form 1099-C issued? Yes No

Due to foreclosure or bankruptcy? Yes No

Sale price

Money received: \$

Value of other property/services: \$

Value of debts assumed by buyer: \$ (eg: notes, mortgages)

Real estate taxes paid by buyer on your behalf: \$

TOTAL SALE PRICE \$

Expenses

Realtor commissions: \$

Advertising and staging: \$

Legal fees: \$

Buyer's expenses you agreed to pay: \$ (eg: mortgage points, loan charges)

Other expenses: \$

TOTAL SALE EXPENSES \$

Home cost details:

When filing Married Filing Separately, only enter your portion of the amounts below.

\$

\$

Home improvements total \$ (Total from home improvements tab)

HOME COST BASIS \$

Tax assessments: \$ (eg: sidewalks, local improvements, HOA or condominium assessments)

Expenses

Legal fees: \$

Survey and recording fees: \$

Title insurance: \$

Seller fees you agreed to pay: \$ (eg: real estate taxes prior to sale, title/mortgage fees, repair charges, real estate agent commissions)

Other fees: \$ (eg: sales tax on a mobile home or houseboat used as the home)

TOTAL PURCHASE EXPENSES \$

Adjustments (Decreases to your basis)

Payments received for easement, conservation restriction or right-of-way: \$

Energy credits or subsidies: \$

Adoption credits claimed or nontaxable payments from an employer-sponsored adoption assistance program: \$

Real estate taxes the seller paid on your behalf: \$

Mortgage points the seller paid on your behalf: \$

Sales tax paid on a mobile home or houseboat \$ If claimed as a deduction on a federal tax return

Other \$

TOTAL ADJUSTMENTS \$

ADJUSTED COST BASIS \$

Home improvements:

Examples of improvements you can not include in your basis

- Do not include any costs of repairs or maintenance that are necessary to keep your home in good condition but don't add to its value or prolong its life. Examples include painting (interior or exterior), fixing leaks, filling holes or cracks, or replacing broken hardware.
- Do not include any costs of any improvements that are no longer part of your home (for example, wall-to-wall carpeting that you installed but later replaced).
- Do not include any costs of any improvements with a life expectancy, when installed, of less than 1 year.
- Do not enter individual amounts if they are part of a larger renovation project

Exception: The entire job is considered an improvement if items that would otherwise be considered repairs are done as part of an extensive remodeling or restoration of your home. For example, if you have a casualty and your home is damaged, increase your basis by the amount you spend on repairs that restore the property to its pre-casualty condition.

Examples of improvements you can include in your basis

- If the same improvement was made more than once, only use the cost for the most recent improvement

Systems

Air/water filtration systems	\$ <input type="text"/>	Furnace	\$ <input type="text"/>
Central air conditioning	\$ <input type="text"/>	Heating system	\$ <input type="text"/>
Central humidifier	\$ <input type="text"/>	Lawn sprinkler system	\$ <input type="text"/>
Central vacuum	\$ <input type="text"/>	Security system	\$ <input type="text"/>
Duct work	\$ <input type="text"/>	Wiring	\$ <input type="text"/>
(Other)	\$ <input type="text"/>	(Other)	\$ <input type="text"/>

Additions

Bedroom	\$ <input type="text"/>	Garage	\$ <input type="text"/>
Bathroom	\$ <input type="text"/>	Patio	\$ <input type="text"/>
Deck	\$ <input type="text"/>	Porch	\$ <input type="text"/>
(Other)	\$ <input type="text"/>	(Other)	\$ <input type="text"/>

Grounds

Driveway	\$ <input type="text"/>	Retaining wall	\$ <input type="text"/>
Fence	\$ <input type="text"/>	Swimming pool	\$ <input type="text"/>
Landscaping	\$ <input type="text"/>	Walkway	\$ <input type="text"/>
(Other)	\$ <input type="text"/>	(Other)	\$ <input type="text"/>

Pipes and duct work

Filtration system	\$ <input type="text"/>	Soft water system	\$ <input type="text"/>
Plumbing	\$ <input type="text"/>	Water heater	\$ <input type="text"/>
Septic system	\$ <input type="text"/>	(Other)	\$ <input type="text"/>

Interior

Built-in appliances	\$ <input type="text"/>	Kitchen modernization	\$ <input type="text"/>
Fireplace	\$ <input type="text"/>	Wall-to-wall carpeting	\$ <input type="text"/>
Flooring	\$ <input type="text"/>	(Other)	\$ <input type="text"/>

Exterior

New roof	\$ <input type="text"/>	Satellite dish	\$ <input type="text"/>
New siding	\$ <input type="text"/>	Storm windows/doors	\$ <input type="text"/>
(Other)	\$ <input type="text"/>	(Other)	\$ <input type="text"/>

Insulation

Attic	\$ <input type="text"/>	Walls	\$ <input type="text"/>
Floors	\$ <input type="text"/>	(Other)	\$ <input type="text"/>

Remodeling projects

For repairs done as part of larger project — See the exception note above.

(Description)	\$ <input type="text"/>
---------------	-------------------------

Home improvements total = \$

TaxSlayer input: Enter directly as Capital Gains Enter on Sale of Home Worksheet

Since a Form 1099-S was not issued and the use of the exclusion produces no gain, this main home sale does not need to be reported to the IRS. If you do wish to report it, check this box .

Sale of Main Home Worksheet

Basic Information about Your Home

Basic info about the Sale

Date of purchase
 Purchase price
 Date of sale
 Sale price

Info about your home

How many days in the last 5 years was the home your main home?
 How many days in the last 5 years did you own your home?
 How many days in the last 5 years was the home your spouse's main home
 How many days in the last 5 years did your spouse own your home?
 Check here if you recieved the first-time Homebuyers Credit...

First-time homebuyer credit - Sale of Home section

(Answer first-time homebuyer questions as needed)

Selling price of home, insurance proceeds, ...
 Selling expenses (including commissions, advertising and legal fees, ...>
 Adjusted basis of home sold
 Check here if you qualify for the Maximum Exclusion... (TP)
 Check here if you qualify for the Maximum Exclusion... (SP)

Adjustments to the Sale

Fees you may have paid when you bought your home

Legal fees
 Surveys
 Title Insurance
 Fees that the seller owed that you agreed to pay
 Other fees

General adjustments

Selling expenses
 Cost of additions and improvements that you made to your home
 Tax assessments that you paid for sidewalks, streets and other local improvements
 Other increases to your basis
 Decreases to your basis
 Does return qualify for \$250,000/\$500,000 max exclusion?

Capital Gains and Loss Items

Description of Property	Main home
Date Acquired	
Date Sold	
Sales Price	
Cost basis type	Did not receive Form 1099-B
Cost	
Adjustments	
Adjustment explanation	H
Gain/Loss	