Sale or Exchange of Property Form

Your Name: _____ **Telephone:** _____ **Tax Year:** _____

☐ **Please provide us with copies of brokerage statements and any and all Forms 1099, also any California real estate withholding statements.**

Kind of Property and Description (Ex: 100 shares IBM)	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Expense of Selling	Gain or Loss (Optional)

☐ **For sales of real property (including real estate, rental real estate, please provide us with a copy of your escrow documents.**

Notes/Comments:

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