

SALE OF INVESTMENT PROPERTY

Last Name: _____

Address: _____

Original Purchase Date: _____

*Or date transferred to rental property if originally a principal residence.

Purchase Amount: \$ _____

*Or value at the day of transferred (realtor assessment)

Closing Date: _____

Selling Amount: \$ _____

DIRECT EXPENSES DUE TO CLOSING/CONDITIONS OF SALE

Closing Costs: _____ (Not deducted against rental income)

Repairs: _____ (Not deducted against rental income)

PLEASE INCLUDE:

- ☐ Previous tax returns
- ☐ Summary of rental income/losses over the years (if not displayed in detail on the tax returns)
- ☐ Copy of the legal closing documents

*If we completed your tax returns, only a copy of the legal closing documents is needed of the list above.

Any additional notes you wish KBS to know: