



Family TAX OFFICE

SALE OF RENTAL REAL ESTATE

Original date you purchased OR placed in service for rent _____

Date Depreciation Began _____

Purchase price of your home plus acquisition costs/escrow fees? _____

Please provide last tax year depreciation worksheet was filed.

(PLEASE PROVIDE ESCROW SETTLEMENT STATEMENT/CLOSING DISCLOSURES FROM ORIGINAL SALE, IF POSSIBLE)

Cost of repairing your rental property to make ready for sale \$ _____

(IF PART YEAR RENTED PRIOR TO SALE, PLEASE FILL OUT OUR RENTAL CHECKLIST)

Address: _____

SALES PRICE \$ _____

Date Sold: _____ Please provide Form 1099-S and Ca Form 593 tax withholding

(PLEASE PROVIDE ESCROW SETTLEMENT/ CLOSING DISCLOSURES STATEMENT ON THE SALE)

☐ The house was used in a 1031 exchange.

Documents we need:

- Most recent depreciation worksheet
- Rental income and expenses in the year sold
- Original purchase escrow settlement/closing disclosures
- Sale of home Form 1099S
- Ca Form 593 Tax withholding
- Sale of home escrow settlement/closing disclosures
- New home purchase escrow settlement/closing disclosures if 1031 exchange or you purchased a new rental

Questions:

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