



# 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:

**(760) 870-4441 text    (858) 301-6100 office    (760) 870-7770 fax**

14231 Garden Rd Suite 11 Poway Ca 92064

**www.FamilyTaxOffice.com**