

**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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