

Client Intake Questionnaire

Sales of Stock, Your Principal Residence or Other Capital Assets

- A. Stock Market And Sales On Other Capital Assets (Primarily Includes Property held for Investment Such As Stocks or Bonds or Collectibles on Which You Can Take a Capital Loss). Please bring your 1099Bs. Note that the VITA program does not allow complicated Schedule D tax preparations. For these, a paid preparer is required.

For each item sold, please provide the following information:

Seq No.	Description	Date Acquired	Date Sold	Cost or Other Basis	Selling Price
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
	Attach Additional Sheets If Necessary				

Did you have a prior year capital loss carryover? Yes No

- B. Sale of Principal Residence. A single homeowner can generally exclude up to \$250,000 of gain from the sale of a main home, and up to \$500,000 MFJ. (Losses Not Permitted)

- Did EITHER you or your spouse OWN your main home any two out of the last five years? (Going back from the date of sale)..... Yes No
- Did BOTH you and your spouse USE your main for any two out of the last five years? (Does not have to be continuous)..... Yes No
- Did EITHER you or your spouse exclude gain from the sale of your principal residence at any time during the last two years? Yes No