



personal touch tax & financial consultants

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SALE OF INVESTMENT PROPERTY OR STOCK

IF THERE ARE ANY QUESTIONS PLEASE FEEL FREE TO CALL US FOR ASSISTANCE.

REMEMBER TO ROUND TO THE NEAREST WHOLE DOLLAR.

FIRST NAME _____ MIDDLE _____ LAST _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

PHONE _____ EMAIL _____

TAX YEAR _____ SS NUMBER _____

SALE OF PERSONAL RESIDENCE

ORIGINAL PURCHASE PRICE _____

COST OF ANY IMPROVEMENTS _____

SETTLEMENT SHEET OF HOME SOLD _____

SETTLEMENT SHEET ON NEW HOME _____

HAVE YOU EVER MAINTAINED AN OFFICE IN THE HOME? _____

IF YES. HOW LONG? _____

STOCK SALES

COMPANY (STOCK) NAME _____ NUMBER OF SHARES _____

PURCHASE DATE _____ SOLD DATE _____

PURCHASE PRICE _____ SELLING PRICE _____

COMPANY (STOCK) NAME _____ NUMBER OF SHARES _____

PURCHASE DATE _____ SOLD DATE _____

PURCHASE PRICE _____ SELLING PRICE _____

COMPANY (STOCK) NAME _____ NUMBER OF SHARES _____

PURCHASE DATE _____ SOLD DATE _____

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PURCHASE PRICE _____ SELLING PRICE _____

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PURCHASE DATE _____ SOLD DATE _____

PURCHASE PRICE _____ SELLING PRICE _____



TAX PREP



TAX PLANNING



CONSULTING



RECORD KEEPING



PAYROLL



TRAINING



REPRESENTATION



SCAN & ARCHIVE