

SMITH'S TAX SERVICE

Your Peace of Mind is Our Family Business.

Sell/Buy Home Checklist

The following is a general checklist and may not apply to everyone. Whether you have an appointment or send your information to us, the following is needed.

If you sold your home, we need the following:

- ⇒ Closing statement from home bought
- ⇒ Closing statement from home sold (if applicable)
- ⇒ Any improvements made to home, such as:
 - Additions
 - Siding
 - Paving Driveway
 - Other
- ⇒ If not first home you sold, we need to see tax return showing the previous sale
- ⇒ Any closing costs that may not show on closing statement

If you bought a home, we need the following:

- ⇒ Closing statement from the purchase of the home
- ⇒ Any costs that may not show up on the closing statement