CAPITAL GAINS AND LOSSES - SCHEDULE D

NAME	SOCIAL SECURITY NUMBER

SHORT TERM CAPITAL GAINS AND LOSSES - *Assets Held One Year or Less*

Description	# Shares	Purchase Date	Date Sold	Sales Proceeds	Total Cost / Basis	Gain / (Loss)	*
TOTALS - **Short Term Capital Gains / (Losses)**							

* Please note if item sold was a collectible "C" or a closely held small business stock "B".

Notes/Instructions:

1. Include broker commissions in the cost and total sales proceeds of the asset.
2. Separate sales into the short term and long term categories. If you sell 500 shares of IBM and 200 of the shares were purchased one month ago, and 300 shares were purchased 12 or more months ago, record the Short Term gain / (loss) of the 200 shares above and record the Long Term gain / (loss) of the 300 shares on the reverse side.
3. Only include the capital gain / loss portion of mutual funds here. Mutual fund dividends should be reported as "dividends".
4. Do you have capital losses to be carried forward from a prior year? ☐ Yes ☐ No ☐ Unsure
5. Do not include retirement transactions (IRA, 401-k, etc.) on this form.
6. Please attach appropriate 1099's.

ON BACK — Long Term Capital Gains & Losses - *Assets Held More Than One Year.*

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CAPITAL GAINS AND LOSSES - SCHEDULE D

NAME	SOCIAL SECURITY NUMBER

LONG TERM CAPITAL GAINS AND LOSSES - *Assets Held More Than One Year*

Description	# Shares	Purchase Date	Date Sold	Sales Proceeds	Total Cost / Basis	Gain / (Loss)	*
TOTALS - Long Term Capital Gains / (Losses)							

* Please note if item sold was a collectible "C" or a closely held small business stock "B".

Please use this area to note any questions or comments. ______________________________

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