Receipts, cancelled checks, and other verification of improvements/expenses

for a home should be kept for **no less than 4 years after a home is sold**.

*Use pencil for the “Total” column so the amounts can be changed when additional improvements are made.*

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Special Assessments** | **Year** | **Amount** | **Year** | **Amount** | **Year** | **Amount** | **Year** | **Amount** | **Total** |
| Sewer & Storm Sewer |  |  |  |  |  |  |  |  |  |
| Water Connections |  |  |  |  |  |  |  |  |  |
| Streets, Sidewalks, Alleys |  |  |  |  |  |  |  |  |  |
| Parks & Lighting |  |  |  |  |  |  |  |  |  |
| Other |  |  |  |  |  |  |  |  |  |  |
| Other |  |  |  |  |  |  |  |  |  |  |
| **Outside Improvements** | **Year** | **Amount** | **Year** | **Amount** | **Year** | **Amount** | **Year** | **Amount** | **Total** |
| Additional Acreage/Lots, Surveying |  |  |  |  |  |  |  |  |  |
| Additions to Buildings |  |  |  |  |  |  |  |  |  |
| Porch, Breezeway, Deck |  |  |  |  |  |  |  |  |  |
| Siding & Flashing |  |  |  |  |  |  |  |  |  |
| Garage, Work shed, Storage |  |  |  |  |  |  |  |  |  |
| Roof Replacement |  |  |  |  |  |  |  |  |  |
| Windows, Screens, Screen/Storm Doors |  |  |  |  |  |  |  |  |  |
| Pipes & Dry Wells |  |  |  |  |  |  |  |  |  |
| Termite Proofing |  |  |  |  |  |  |  |  |  |
| Other |  |  |  |  |  |  |  |  |  |  |
| Other |  |  |  |  |  |  |  |  |  |  |
| **Lawn, Garden, Grounds** | **Year** | **Amount** | **Year** | **Amount** | **Year** | **Amount** | **Year** | **Amount** | **Total** |
| Terraces, Patios, Retaining Wall |  |  |  |  |  |  |  |  |  |
| Cement & Asphalt |  |  |  |  |  |  |  |  |  |
|  Steps, Walks, Driveway |  |  |  |  |  |  |  |  |  |
|  Bird, Bath, Patio, Other |  |  |  |  |  |  |  |  |  |
| Fences, Gates, Play Yard |  |  |  |  |  |  |  |  |  |
| Kennel, Barbeque Pit, Greenhouse |  |  |  |  |  |  |  |  |  |
| Water Well, Pump, Sprinkler System |  |  |  |  |  |  |  |  |  |
| Rototill, Grading, Fill, Topsoil |  |  |  |  |  |  |  |  |  |
| Sod, Fertilizers, Seed, Plants |  |  |  |  |  |  |  |  |  |
| Trees, Shrubs, Bushes, Vines |  |  |  |  |  |  |  |  |  |
| Clotheslines |  |  |  |  |  |  |  |  |  |
| Water Proofing & Drainage |  |  |  |  |  |  |  |  |  |
| Mail Box & Trellis |  |  |  |  |  |  |  |  |  |
| Garden (installation), Swimming Pool |  |  |  |  |  |  |  |  |  |
| Other |  |  |  |  |  |  |  |  |  |  |
| Other |  |  |  |  |  |  |  |  |  |  |
|  |

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Inside Additions & Improvements** | **Year** | **Amount** | **Year** | **Amount** | **Year** | **Amount** | **Year** | **Amount** | **Total** |
| Conversions: Attics or Basement |  |  |  |  |  |  |  |  |  |
|  Into Bedrooms or Recreation |  |  |  |  |  |  |  |  |  |
| Inside Walls: Altering & Plastering |  |  |  |  |  |  |  |  |  |
| Wood Paneling, Wood Tile |  |  |  |  |  |  |  |  |  |
| Room Dividers & Partitions |  |  |  |  |  |  |  |  |  |
| Ceilings & Lighting |  |  |  |  |  |  |  |  |  |
| Replace or Add Stairs |  |  |  |  |  |  |  |  |  |
| Wood Flooring, Tile, Linoleum |  |  |  |  |  |  |  |  |  |
| Carpeting |  |  |  |  |  |  |  |  |  |
| Cabinets & Cupboards |  |  |  |  |  |  |  |  |  |
| Closets & Shelves |  |  |  |  |  |  |  |  |  |
| Bookcases, Other Built-Ins, Mirrors |  |  |  |  |  |  |  |  |  |
| Installed Furniture: |  |  |  |  |  |  |  |  |  |
|  Booths, Bars, Counters |  |  |  |  |  |  |  |  |  |
| Fireplace & Equipment |  |  |  |  |  |  |  |  |  |
| Radiator Covers & Ventilators |  |  |  |  |  |  |  |  |  |
| Windows, Window Treatments, Storms |  |  |  |  |  |  |  |  |  |
| Curtains, Draperies, Blinds, Hot Tubs |  |  |  |  |  |  |  |  |  |
| Wallpaper (First time only) |  |  |  |  |  |  |  |  |  |
| Other |  |  |  |  |  |  |  |  |  |  |
| Other |  |  |  |  |  |  |  |  |  |  |
| **Equipment Installed** |
| ***Bathroom*** | **Year** | **Amount** | **Year** | **Amount** | **Year** | **Amount** | **Year** | **Amount** | **Total** |
| Medicine Cabinet & Mirrors |  |  |  |  |  |  |  |  |  |
| Shower Cabinet & Controls |  |  |  |  |  |  |  |  |  |
| Tub, Towel Racks, Hangers |  |  |  |  |  |  |  |  |  |
| Sliding Doors & Heater |  |  |  |  |  |  |  |  |  |
| Other |  |  |  |  |  |  |  |  |  |  |
| ***Kitchen & Laundry*** | **Year** | **Amount** | **Year** | **Amount** | **Year** | **Amount** | **Year** | **Amount** | **Total** |
| Counters, Sinks & Drainboards |  |  |  |  |  |  |  |  |  |
| Range, Oven, Hood, Ventilators |  |  |  |  |  |  |  |  |  |
| Dishwasher & Refrigerator |  |  |  |  |  |  |  |  |  |
| Disposal & Freezer |  |  |  |  |  |  |  |  |  |
| Washer, Dryer, Laundry Tub |  |  |  |  |  |  |  |  |  |
| Hamper, Chutes, Table, Racks |  |  |  |  |  |  |  |  |  |
| Cabinets, Tops, Built-Ins |  |  |  |  |  |  |  |  |  |
| Other |  |  |  |  |  |  |  |  |  |  |
| ***Hardware, Fixtures, Locks*** | **Year** | **Amount** | **Year** | **Amount** | **Year** | **Amount** | **Year** | **Amount** | **Total** |
| For Cabinets & Closets |  |  |  |  |  |  |  |  |  |
| For Doors & Windows |  |  |  |  |  |  |  |  |  |
| For Curtains & Drapes |  |  |  |  |  |  |  |  |  |
| Lighting Fixtures |  |  |  |  |  |  |  |  |  |
| Other |  |  |  |  |  |  |  |  |  |  |

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| ***Mechanical Equipment*** | **Year** | **Amount** | **Year** | **Amount** | **Year** | **Amount** | **Year** | **Amount** | **Total** |
| Soft Water System |  |  |  |  |  |  |  |  |  |
| Hot Water Heater |  |  |  |  |  |  |  |  |  |
| Furnace & Space Heaters |  |  |  |  |  |  |  |  |  |
| Fans, Duct Work, Louvers |  |  |  |  |  |  |  |  |  |
| Air Conditioning & Cooling |  |  |  |  |  |  |  |  |  |
| Radiators, Valves, Grills |  |  |  |  |  |  |  |  |  |
| Humidifier & Dehumidifier |  |  |  |  |  |  |  |  |  |
| Other |  |  |  |  |  |  |  |  |  |  |
| ***Electricity & Lighting*** | **Year** | **Amount** | **Year** | **Amount** | **Year** | **Amount** | **Year** | **Amount** | **Total** |
| Fixtures, Switches, Cover Plates |  |  |  |  |  |  |  |  |  |
| Conduit & Fuse, Junction Boxes |  |  |  |  |  |  |  |  |  |
| Wiring System & Circuit Breakers |  |  |  |  |  |  |  |  |  |
| Lightning Rods & TV Antenna |  |  |  |  |  |  |  |  |  |
| Floodlights, Cable TV Wiring |  |  |  |  |  |  |  |  |  |
| Other |  |  |  |  |  |  |  |  |  |  |
| ***Plumbing & Sanitation*** | **Year** | **Amount** | **Year** | **Amount** | **Year** | **Amount** | **Year** | **Amount** | **Total** |
| Pipes, Tubing, Drains, Traps |  |  |  |  |  |  |  |  |  |
| Pumps, Septic System, Sump Pumps |  |  |  |  |  |  |  |  |  |
| Fixtures & Controls |  |  |  |  |  |  |  |  |  |
| Caulking, Tiling, Waterproofing |  |  |  |  |  |  |  |  |  |
| Other |  |  |  |  |  |  |  |  |  |  |
| ***Communication*** | **Year** | **Amount** | **Year** | **Amount** | **Year** | **Amount** | **Year** | **Amount** | **Total** |
| Call Bells or Chimes |  |  |  |  |  |  |  |  |  |
| Intercommunication/Music System |  |  |  |  |  |  |  |  |  |
| Fire or Burglar Alarms/Security System |  |  |  |  |  |  |  |  |  |
| Other |  |  |  |  |  |  |  |  |  |  |
| ***Insulation*** | **Year** | **Amount** | **Year** | **Amount** | **Year** | **Amount** | **Year** | **Amount** | **Total** |
| Ceilings, Floors, Walls |  |  |  |  |  |  |  |  |  |
| Roof, Attic, Basement |  |  |  |  |  |  |  |  |  |
| Pipes, Ducts, Weather-stripping |  |  |  |  |  |  |  |  |  |
| Other |  |  |  |  |  |  |  |  |  |  |
|  | **Add All Improvement Amounts in “Total” Colums = $**  |

***Items Necessary to Report the Sale of a Personal Residence:***

1. If this is first home ever sold, provide closing statement from purchase of old home which will include the purchase price and closing costs. Otherwise, the prior year house sale Form 2119 will normally include the necessary information.
2. A list of ALL improvements made to the property including special assessments, if any. (Use this form.) It may help to mentally picture each part of the house and yard, and what was done to improve it. Estimate costs, if records are not available. If no records on special assessments, contact the county real estate office.
3. Closing statement from the sale of the old house.
4. Have you ever claimed depreciation, residential energy credits (1977-1987) or a casualty loss on your home? YES NO
5. Has any part of your lot/land ever been subdivided and sold? YES NO If yes, provide information.

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