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 Licensed to Represent Taxpayers Before the IRS

**Member:** Illinois Society of Enrolled Agents  
 National Association of Enrolled Agents

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									

<b>Inside Additions &amp; Improvements</b>	<b>Year</b>	<b>Amount</b>	<b>Year</b>	<b>Amount</b>	<b>Year</b>	<b>Amount</b>	<b>Year</b>	<b>Amount</b>	<b>Total</b>
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									
<b>Equipment Installed</b>									
<b>Bathroom</b>	<b>Year</b>	<b>Amount</b>	<b>Year</b>	<b>Amount</b>	<b>Year</b>	<b>Amount</b>	<b>Year</b>	<b>Amount</b>	<b>Total</b>
Medicine Cabinet & Mirrors									
Shower Cabinet & Controls									
Tub, Towel Racks, Hangers									
Sliding Doors & Heater									
Other									
<b>Kitchen &amp; Laundry</b>	<b>Year</b>	<b>Amount</b>	<b>Year</b>	<b>Amount</b>	<b>Year</b>	<b>Amount</b>	<b>Year</b>	<b>Amount</b>	<b>Total</b>
Counters, Sinks & Drainboards									
Range, Oven, Hood, Ventilators									
Dishwasher & Refrigerator									
Disposal & Freezer									
Washer, Dryer, Laundry Tub									
Hamper, Chutes, Table, Racks									
Cabinets, Tops, Built-Ins									
Other									
<b>Hardware, Fixtures, Locks</b>	<b>Year</b>	<b>Amount</b>	<b>Year</b>	<b>Amount</b>	<b>Year</b>	<b>Amount</b>	<b>Year</b>	<b>Amount</b>	<b>Total</b>
For Cabinets & Closets									
For Doors & Windows									
For Curtains & Drapes									
Lighting Fixtures									
Other									

<b>Mechanical Equipment</b>	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									
<b>Electricity &amp; Lighting</b>	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									
<b>Plumbing &amp; Sanitation</b>	Year	Amount	Year	Amount	Year	Amount	Year	Amount	Total
Pipes, Tubing, Drains, Traps									
Pumps, Septic System, Sump Pumps									
Fixtures & Controls									
Caulking, Tiling, Waterproofing									
Other									
<b>Communication</b>	Year	Amount	Year	Amount	Year	Amount	Year	Amount	Total
Call Bells or Chimes									
Intercommunication/Music System									
Fire or Burglar Alarms/Security System									
Other									
<b>Insulation</b>	Year	Amount	Year	Amount	Year	Amount	Year	Amount	Total
Ceilings, Floors, Walls									
Roof, Attic, Basement									
Pipes, Ducts, Weather-stripping									
Other									
<b>Add All Improvement Amounts in "Total" Columns = \$ _____</b>									

**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.