

V. Sale of Investment Property (stocks, bonds, mutual funds, rental property, business property):

Your tax reporting statement may provide some or all information required. If so, only fill in the information not given on your reporting statement.

Description of property sold	Date property was acquired	Date property was sold	Sale price	Total cost or basis

★ Please note if any property was acquired by gift or inheritance and was not purchased

Include date of gift, value on date of gift and original cost to the donor.

VI. Estimated income for next year

(If you expect everything to remain about the same just write the word “**Same**” on the line)

- A. Salary _____
- B. Clergy housing allowance (please note if expecting expenses to be less) _____
- C. Pension/retirement income _____
- D. Social security benefits _____
- E. Interest and dividend income _____
- F. Other income _____
- G. Significant changes expected to occur next year (e.g. child may no longer qualify as a dependent)