

**♥ Sale of Investment Property Worksheet** (stocks, bonds, mutual funds, rental property, business property)

Please include all brokerage and other related statements.

Description of property	How Acquired (purchase, inheritance, gift)	Date acquired	Date sold	Sale price	Cost basis

**♥ Estimated Income for Next Year**

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

Salary	
Clergy housing allowance (please note if expecting expenses to be less)	
Pension/retirement income	
Social security benefits	
Interest and dividend income	
Other income	

Significant changes expected to occur next year (e.g. child may no longer qualify as a dependent):

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