Sales of Stocks and Securities

☑ **Attach all copies of Forms 1099-B and/or 1099-S here.**

		Yes	No
1	Did you exchange any securities for other securities or any other property held for investment?	☐	☐
2	Did you acquire stock identical to stock sold at a loss within a period beginning 30 days prior to and ending 30 days after the date of the sale?	☐	☐
3	Did you engage in any transactions involving traded options?	☐	☐
4	Did you engage in any transactions involving commodity future contracts and straddle positions?	☐	☐
5	Did you engage in any transactions involving *employee* stock options?	☐	☐

Do not include installment sales transactions here. Complete information on Installment Sales Income (ORG23) instead.

FORMS 1099-B, 1099-S – SALES OF STOCKS, BONDS, REAL ESTATE, ETC.

TSJ	Reported on Form 1099-B? *		Description of Property		Date Sold	Date Acquired
	Type **	Sales Price	Cost/Other Basis	Fed Withholding		S/L

*** Reported on Form 1099-B?**

A = Yes, with basis amount in Box 3 B = Yes, but no basis amount in Box 3 C = No, not reported on Form 1099-B

**** Type**

S = Stocks, bonds, etc
M = Collectible (28% Rate)
N = Nonbusiness Bad Debt
P = Personal Loss on Noninvestment Property
W = Wash Sale
E = Stock sales to ESOP's or EWOC's
X = Expired (options, etc)
K = Bankrupt
O = Worthless