

Sale or Disposition of Primary Residence Worksheet

Property Owner(s): _____

Please provide the following information if you **sold your Principal Residence** during the tax year we are preparing.

Please select one:

- I designate the property below to have been my principal residence for all years owned.
- I designate the property below to have been my principal residences for some, but not all of the years owned. (Years owned: From ____/____ to ____/____)
mm yyyy mm yyyy

Address of property			Year property was purchased	Proceeds of Sale \$	% of Ownership
Unit #	Street number and street name				
City	Province	Postal Code			

- I have included a Lawyer's Statement of Adjustments of Sale.

Please provide the following if you ***changed the use of your Principal Residence** during the tax year we are preparing.

Please select one:

- The property has been changed from a primary residence to a rental operation.
 Entire property Part of property: _____ % is now a rental.
- The property has been changed from a rental operation to a primary residence.
 Entire property Part of property: _____ % is now a primary residence.

Address of property			Date of change of use	Fair Market Value** at date of change \$
Unit #	Street number and street name			
City	Province	Postal Code		

*A deemed disposition will occur if there is a change in use of the property:

- You change all or part of your principal residence to a rental or business operation.
- You change your rental or business operation to a principal residence.

** For assistance with determining your property's fair market value (FMV) at the time of change of use, please speak with your trusted RHN professional.

Thank you for choosing **Harbourfront&Bastion, Chartered Professional Accountant** for your personal tax planning needs!