➤ Name/s of Owner/s: _____

Realized Capital Gains/Losses 8949

ATTACH **1099-Bs** AND BROKER/MUTUAL FUND STATEMENTS TO THIS FORM*

Before you fill out this sheet, go to your financial institution's web site, or call them and see if you can obtain the needed information in an Excel format.

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			Dates		Amounts		Short Term		Long Term	
			Purchased	Sold	Sale	Purchase	(less than 1 year)		(more than 1 Year)	
Description Name of Stocks/Mutual Funds/Asset [Box #5]	**Number** of Shares	**(T) (S) (J)**	Mo/Day/Yr	Mo/Day/Yr [Box #1A]	Amt. Received After Commission [Box #2]	Cost* Including Commission	Gain	(Loss)	Gain	(Loss)

* If you sold mutual fund shares, including switching from one fund to another, you should be aware that computing gains/losses may be an ordeal. Some mutual funds and brokerage firms are computing and printing the gains/losses either on an annual statement or the monthly statement which the sale incurred. If your mutual fund is not able to give you the needed information then you should provide us with all annual statements from year of purchase.

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➤ Names/s of Owner/s _____

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1099-Bs Reconciliation 8949

ATTACH **1099-Bs** AND BROKER/MUTUAL FUND STATEMENTS TO THIS FORM

Name of Payer / Broker / Mutual Fund*	Box #2 (Total) *	Box #4 Fed Tax W/H
	$	$

SCHEDULE D RECONCILLIATION	Leave Blank	Leave Blank
Schedule D, line 3 (Short Term)	$	
Schedule D, line 10 (Long Term)	$	
TOTAL	$	$

*Please list each 1099-B, Payer and Total Amount (not detail) from Box #2.

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