

**Sales of Stocks and Securities**

ORG21

**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? .....	<input type="checkbox"/>	<input type="checkbox"/>
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? .....	<input type="checkbox"/>	<input type="checkbox"/>
3 Did you engage in any transactions involving traded options? .....	<input type="checkbox"/>	<input type="checkbox"/>
4 Did you engage in any transactions involving commodity future contracts and straddle positions? .....	<input type="checkbox"/>	<input type="checkbox"/>
5 Did you engage in any transactions involving <i>employee</i> stock options? .....	<input type="checkbox"/>	<input type="checkbox"/>
6 Schedule D included in the 2013 Federal income tax return? .....	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Do not include installment sales transactions here. Complete information on Installment Sales Income (ORG23) instead. See notes below for entries to be made on lines 1d, 4a, 4b and 5

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

Transaction number.....

1a Check if this sale was reported to you on Form 1099-B or substitute statement .....

b If so, check if Box 6a is marked (i.e., this is the sale of noncovered security).....

c If so, check if Box 6b is marked (i.e., the basis amount was reported to the IRS).....

d If so, select type of gain (loss) indicated in Box 1c \*.....

2 Description of property .....

3a Date acquired ..... b Date sold .....

4a Type of transaction \*\*\* ..... b Property ownership \*\* .....

5 Holding period \* .....

6 Sales price .....

7 Cost or other basis.....

8 Wash sale loss disallowed.....

9 Federal Tax withheld (if any).....

10a State..... b State identification ..... c State tax withheld.....

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5 Holding period \* .....

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8 Wash sale loss disallowed.....

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10a State..... b State identification ..... c State tax withheld.....

**\* Type of Holding Period**

- S = Short-term (one year or less)
- L = Long-term (more than one year)

**\*\* Type of Ownership**

- T = Taxpayer Ownership
- S = Spouse Ownership
- J = Joint Ownership

**\*\*\* Type of Transaction**

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