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NON-RESIDENT SELLER WITHHOLDING INFORMATION FORM

Please complete only the applicable sections of this form. The information provided will be used to prepare the required Non-Resident Seller Withholding filings. Once completed, please email the form to the assigned paralegal. If you have any questions, please contact our office.

Address of Property: _____

Original Purchase Price: *the amount you paid when you originally purchased the property.*
\$ _____

Cost Basis: *If you have an accountant, obtain your estimated cost basis from them. Otherwise, estimate your cost basis by totaling the cost of any permanent capital improvements (e.g., additions, renovations, or remodeling) made to the property.* \$ _____

SELLER IS AN INDIVIDUAL

Seller name: _____
Primary residential address: _____
Phone number: _____
Email address: _____
Full Social Security Number: _____

Seller name: _____
Primary residential address: _____
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Full Social Security Number: _____

Seller name: _____
Primary residential address: _____
Phone number: _____
Email address: _____
Full Social Security Number: _____

SELLER IS A CORPORATION (please attach a copy of the Bylaws, if any)

Corporation name: _____
State of incorporation: _____
Location of Corporation's principal office: _____
Corporation federal tax ID number: _____

SELLER IS AN LLC (please attach a copy of the Operating Agreement, if any)

LLC name: _____
State of organization: _____
Location of LLC's principal office: _____
LLC federal tax ID number: _____

Select the LLC's federal tax classification:

- ☐ Disregarded Entity (single-member LLC only)
☐ Partnership
☐ Corporation

Please provide the following information for each Member.

Member name: _____
Primary residential address: _____
Phone number: _____
Email address: _____
Full Social Security Number: _____
Percentage of ownership: _____

Member name: _____
Primary residential address: _____
Phone number: _____
Email address: _____
Full Social Security Number: _____
Percentage of ownership: _____

Member name: _____
Primary residential address: _____
Phone number: _____
Email address: _____
Full Social Security Number: _____
Percentage of ownership: _____

SELLER IS A TRUST *(please attach a copy of the Trust and any amendments)*

Trust name: _____
Trust Federal Tax Identification Number (TIN/EIN): *If the trust does not have its own Tax ID number or you are unsure what it is, please provide the Settlor's SSN.* _____

Please provide the following information for each Settlor (the person who created the Trust)

Settlor name: _____
Primary residential address: _____
Phone number: _____
Email address: _____
Full Social Security Number: _____
If the settlor is deceased, what is his/her date of death: _____

Settlor name: _____
Primary residential address: _____
Phone number: _____
Email address: _____
Full Social Security Number: _____
If the settlor is deceased, what is his/her date of death: _____

Please provide the following information for each Beneficiary

Beneficiary name: _____
Primary residential address: _____
Phone number: _____
Email address: _____
Full Social Security Number: _____
Percentage of share: _____

Beneficiary name: _____
Primary residential address: _____
Phone number: _____
Email address: _____
Full Social Security Number: _____
Percentage of share: _____

Beneficiary name: _____
Primary residential address: _____
Phone number: _____
Email address: _____
Full Social Security Number: _____
Percentage of share: _____

POTENTIAL TAX EXEMPTIONS *(Please check the appropriate response)*

Question	Yes	No
Is this property your primary residence (you owned and lived in the property as your primary residence for at least 2 of the past 5 years)?	☐	☐
Is the property owned by an Individual Retirement Account (IRA)?	☐	☐
Is this sale part of a 1031 exchange (selling one investment property to purchase another)?	☐	☐
Is this property being transferred to a partnership as part of a tax-free transaction?	☐	☐
Is this sale the result of the property being condemned, destroyed, or damaged, with replacement property being purchased?	☐	☐

Will you be receiving the sale proceeds over time instead of all at closing (installment sale)?

☐ ☐

[Use the space below for any additional Sellers, Members, Settlers, or Beneficiaries that did not fit above]