

Brokerage Summary Statement 2023

Client Name: _____

Client Code: _____

Preparer: _____

Broker Name	A/C # Last 4 Digits	Sales Proceeds	199A Income	Foreign Income	Foreign Tax Paid	State __ Add Back	State __ Deduction
Totals							

Schedule D Sales Proceeds Totals



Preparers: When there is more than one brokerage statement from the same brokerage company or several statements, list all the statements above with the last 4 digits of the account number, total sales proceeds from the main page, foreign income received and related foreign taxes paid, and add backs or deductions from applicable state (use 2 digit code) Additionally, **tie out the sales proceeds total to the amount shown on Schedule D related to brokerage statements.**

Consider adding columns for dividends, qualified dividends and capital gain distributions.