



# Capital Gains Tax Checklist

This checklist outlines the information that is required if you have sold shares or property during the financial year.

## SALE OF SHARES

Details of Dividend Reinvestments (DRP). This includes the number of shares given and price they were given at, for the whole period of time you held the shares.

Details of any bonus issue. This includes the number of shares given and the price they were given at.

The Buy and Sell Contract. If the you are unable to provide the contracts then the following information will be required:

Date of purchase and sale

Purchase and sale price

Number of shares purchased and sold

Brokerage on the purchase and sale

If you have a brokerage account E.g. Commsec or E-Trade, this information can be obtained from a trading history report

## SALE OF PROPERTY

Settlement statement provided by solicitor for purchase and sale of property

Stamp Duty on purchase

Legal fees on purchase and sale

Surveyor Report costs and other associated fees. E.g. Building Reports

Travel

To inspect the property prior to purchase

To inspect other properties not purchased

Travel to real estate agent for purchase and sale

Travel to solicitor for purchase and sale

Please provide vehicle details, engine capacity and approximate kilometres travelled.

If the property was used as an investment property and owner occupied, we will need the approximate dates for each period.

Lived in from ..... to .....

Rented from ..... to .....

NOTE: Please contact us on 4739 5600 if you are unsure whether you are eligible for a full or partial exemption from Capital Gains Tax.