

Capital Gains Checklist

Did you make a capital gain or loss by selling a capital gain asset:

The most common capital gain event happens when you sell or give away a capital gain asset such as:

- Real Estate
- Shares
- Units in a unit trust or managed fund investment
- Forest managed investment scheme interests
- Collectables - Eg Jewellery
- Personal use assets
- Assets you owned that was lost or destroyed
- You received an amount for entering into an agreement - Eg you agreed not to work in a particular industry for a set period of time
 - You entered into a conservation covenant over land that you owned
 - You received a non-assessable payment from a trust or company.

If you are not sure if a capital gain event had occurred and you have sold assets this year, please contact the office to discuss. If a capital gain event occurred, please complete the following sheet for EACH event that occurred.

What was the capital gain event? _____

Date of original purchase / / **Amount of original purchase \$** _____

List the other costs associated with the purchase

_____ \$
_____ \$
_____ \$
_____ \$
_____ \$

Date of sale / / **Amount of sale \$** _____

List the other costs associated with the sale

_____ \$
_____ \$
_____ \$
_____ \$
_____ \$

**Please ensure that you send all purchase and sale documentation
plus any associated cost documentation with this form**

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