

Capital Gains Checklist

Did you make a capital gain or loss by selling your investment property?

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.

Rental Address: _____

Period of Main Residence of above address if applicable, please provide detailed dates including years: _____

Percentage of Ownership: 100% - if not, what is your percentage: _____ %

Purchase Details

Was this available for rent at time of settlement? Yes or No _____

Contract Date / / **Settlement Date** / / **Adjustment Date** / /

Purchase Price \$ _____

Construction Costs \$ _____

List the other costs associated with the purchase

Stamp Duty \$ _____

Legal Fees \$ _____

Other please specify _____ \$ _____

Other please specify _____ \$ _____

Other please specify _____ \$ _____

Sale Details

Was this rented at time of settlement? Yes or No _____

Contract Date / / **Settlement Date** / / **Adjustment Date** / /

Sale Price \$ _____

List the other costs associated with the sale

Commission \$ _____

Legal Fees \$ _____

Advertising \$ _____

Other please specify _____ \$ _____

Other please specify _____ \$ _____

***Please ensure that you send all purchase and sale documentation
plus, any associated cost documentation with this form to be able to ensure the most
accurate capital gain or loss amount is claimed.***

Liability limited by a scheme approved under Professional Standards Legislation.



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Documents to supply guide

To ensure we can calculate the most accurate capital gain or loss, please provide all the following documentation in this guide relevant to your purchase & sale along with your general tax return information.

Delays in providing this information will further delay your return. If you are struggling to find original documents, you can contact the real estate and or lawyers used to process the purchase & sale and request copies to be sent to you, alternatively please contact us for further assistance 07 5596 4604.

Purchase Details

- ☐ **Settlement Statement**
- ☐ **Contract of Sale**

Other documents to supply if separate from figures listed on settlement statement

- ☐ **Construction Costs**
- ☐ **Legal Fees**
- ☐ **Stamp Duty**
- ☐ **Building & Pest**
- ☐ **Bank Fees**
- ☐ **Insurance**
- ☐ **Rates**
- ☐ **Water**
- ☐ **Other – please supply**

Sale Details

- ☐ **Settlement Statement**
- ☐ **Contract of Sale**

Other documents to supply if separate from figures listed on settlement statement

- ☐ **Commission**
- ☐ **Advertising**
- ☐ **Legal Fees**
- ☐ **Bank Fees**
- ☐ **Rates**
- ☐ **Water**
- ☐ **Other – please supply**

Please ensure that you send *all* purchase and sale documentation
plus, any associated cost documentation with this form to be able to ensure the most accurate capital gain or loss amount is claimed.

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