|  |
| --- |
| **Capital Gain Tax Checklist- Property**  |
| **\*All your information will be safe and confidential** |
| **Did you sell a property during the financial year?**  | Yes/No(Only continue if answer YES) |
| **Your share in the property:**  |  % |
| **Property Address:**  |  |
| **Date the purchase contract was signed:** |   |
| **Purchase Price:**  |   $ |
| **Date the sale contract was signed:** |  |
| **Sale Price:**  |   $ |
| **Did you live in this property at any time?** | Yes/No |
| If YES.**Date Moved In:** **Date Moved Out:** | If NO, move on to next question |
| **Costs of purchase:** |
| **Expense description**  |  **Amount** | **If with Invoice Y/ N**If Y, please provide |
| **Legal Fees/ Conveyance Fees:** |  $Have you deducted this expense under rental property in ACT in previous years? Y/ N |  |
| **Stamp Duty:** | $Have you deducted this expense under rental property in ACT in previous years? Y/ N |  |
| **Buyer Buyers Agent fees:** |  $ |  |
| **Building & pest inspections fees:**  |  $ |  |
| **Renovations & Improvement expense:**  | $ |  |
| **Other purchase expense:** | *(please specify expense description and amount spent)*  |  |
| **Cost of Sale:** |
| **Legal Fees/ Conveyance Fees:**  | $ |  |
| **Real Estate Agent costs:** | $ |  |
| **Capital works add back**  | *Tax agent will fill in figure for you, no need to enter* | *Tax agent will fill in figure for you, no need to enter* |
| **Other sale expense:** | $*please specify expense description and amount spent)* |  |

**Capital Gain Tax Checklist- Shares, manage funds, crypto currency**

If You have other capital gain, such as stock, shares, manage funds, or crypto currency,

please provide the following information for each shares/unit:

* Did you sell any share/ unit/ crypto currency during financial year? Y/ N

Only continue if you select Y

* **Name of shares sold:**
* **Sale date:**
* **Sale price of shares:**
* **Number of sold shares:**
* **Total sale proceeds:**
* **Purchase date:**
* **Purchase price of shares:**
* **Number of purchased shares:**
* **Total purchase price:**
* **Brokerage fees:**
* **Other related expense**:
* **Name of shares sold:**
* **Sale date:**
* **Sale price of shares:**
* **Number of sold shares:**
* **Total sale proceeds:**
* **Purchase date:**
* **Purchase price of shares:**
* **Number of purchased shares:**
* **Total purchase price:**
* **Brokerage fees:**
* **Other related expense**:
* **Name of shares sold:**
* **Sale date:**
* **Sale price of shares:**
* **Number of sold shares:**
* **Total sale proceeds:**
* **Purchase date:**
* **Purchase price of shares:**
* **Number of purchased shares:**
* **Total purchase price:**
* **Brokerage fees:**
* **Other related expense**:

 *Or you can provide the relevant statements from CommSec or other institutions.*