|  |  |  |
| --- | --- | --- |
| **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.*