



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.