

### Roy A McDonald Capital Gains Checklist

Net capital gains – **(a) Did you sell property?** ..... Yes/No

If yes, we will need to know the following information:

(Please complete for each sale)

Address:	\$
<b>Date the purchase contract was signed (not settlement date)</b>	
Purchase cost of the Investment Property	
Purchase costs involved:	
- Legal fees (not already claimed as borrowing costs)	
- Stamp duty on purchase	
- Buyers agent costs	
- Building & pest inspections	
- Other	
<b>Date of sale of the Investment Property</b> (date the sale CONTRACT was signed, not settlement date)	
Sale Price	
Costs involved with sale: Advertising	
- Legal fees	
- Real estate agent costs	
- Other	
Any other relevant information	

**(Please also provide "statement of adjustments" completed by your solicitor/conveyancer)**

**(b) Did you sell any shares?** ..... Yes/No

If yes, we will need to know the following information: (Please complete for each sale)

**Name of shares sold:**

<b>Date of Purchase of Shares</b>	
Purchase cost of the Shares	
Purchase costs involved:	
- Brokerage Fees	
- Other – details of DRP's	
<b>Date of sale of the Shares</b>	
Sale Price	
Sale costs involved:	
- Brokerage Fees	
- Other	
Any other relevant information you are able to supply	