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**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:** | **$** |
| **Date the *purchase* contract was signed (not settlement date)** |  |
| 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 |  |
| **Date of *sale* of the Investment Property** (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:** |  |
| **Date of Purchase of Shares** |  |
| Purchase cost of the Shares |  |
| Purchase costs involved: |  |
| - Brokerage Fees |  |
| - Other – details of DRP’s |  |
| **Date of sale of the Shares** |  |
| Sale Price |  |
| Sale costs involved: |  |
| - Brokerage Fees |  |
| - Other |  |
| Any other relevant information you are able to supply |  |