

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	
• 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 can supply	