

## CAPITAL GAINS TAX CHECKLIST

### Real Estate (Non-Main Residence)

#### PROPERTY PURCHASE DETAILS

- ☐ Property settlement statement and real estate contract
- ☐ Stamp duty on purchase of property
- ☐ Legal fees on purchase of property
- ☐ Building & pest inspection costs
- ☐ Travel fees prior to purchase of property
- ☐ Depreciation report

#### PROPERTY SALE DETAILS

- ☐ Property settlement statement and real estate contract
- ☐ Legal fees on sale of property
- ☐ Real estate commission fees
- ☐ Advertising fees

#### OTHER DETAILS

- ☐ Approximate dates when rented out
- ☐ Approximate dates as a main residence
- ☐ Any sub-division documents
- ☐ Any revaluation documents

### Shares, Cryptocurrency and Managed Funds

#### PURCHASE DETAILS

- ☐ Purchase contract
- ☐ Brokerage fees paid
- ☐ Any Dividend Reinvestment Plan documents

#### SALE DETAILS

- ☐ Sale contract
- ☐ Brokerage Fees
- ☐ Managed Fund tax statements
- ☐ Cryptocurrency tax report
- ☐ Travel to brokers and financial adviser

Any questions?

Don't hesitate to call us on (03) 9848 5933 or email [taxinvest@royamcdonald.com](mailto:taxinvest@royamcdonald.com)