

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, date and price
- ☐ 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

When providing your information to our office, please provide only a summary of the above information, we will request source documents if required.

Any questions?

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