

CAPITAL GAINS TAX
BOUGHT / SOLD PROPERTY CHECKLIST _____

Please use this list as a handy reminder of what will be useful to bring to your appointment.

Please Indicate whether information is applicable (please tick); Y = Yes OR N = No		Y or N
Questions	What to bring	
Shares/ or Managed Funds		
Did you acquire or sell shares or units in a managed fund?	Purchase/ Sale contract and documents showing: <ul style="list-style-type: none"> • Date • Quantity • Price per share/unit • Brokerage 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Property		
Investment property		
• Purchase Details	Documents showing: <ul style="list-style-type: none"> ○ Date of purchase* ○ Purchase price ○ Stamp duty ○ Legal/conveyancing fees 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
• Sale Details	Documents showing: <ul style="list-style-type: none"> ○ Date of sale* ○ Sale price ○ Real Estate Agents fees ○ Legal/conveyancing fees 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
• Ownership	Documents showing: <ul style="list-style-type: none"> ○ Confirm ownership <ul style="list-style-type: none"> ▪ Joint ownership ▪ Tenants in common – what percentages? 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Principal Residence		
• Was the property your principle place of residence for the whole ownership period?		
○ Yes – Capital Gains are tax exempt		
○ No – Was the property rented out for any period?		
▪ Yes	Summary of periods when the property was rented	<input type="checkbox"/> <input type="checkbox"/>
• Did you operate a business from the property?		
○ No – then if also <u>NOT</u> rented, Capital Gains are tax exempt		
○ Yes	▪ What period was the property used for business?	
	▪ What area of the property, expressed as a percentage, did the business occupy?	
	▪ Did you ever claim interest on the mortgage, council rates or insurance? What percentage did you claim?	

*Exchange date and settlement date are important when the property is owned for less than 12 months.