

CAPITAL GAINS TAX CHECKLIST - PROPERTY



Client Name:

Property Address:

Purchase of property	Purchase date: <i>When the purchase contract was signed</i> Purchase price:	___/___/___ \$ _____
Additional purchase costs <i>Refer to settlement statement</i>	Stamp Duty: Legal fees: Any other purchase costs: Charges to establish mortgage:	\$ _____ \$ _____ \$ _____ \$ _____
Non-capital ownership costs	Costs while living in the property <i>Eg Interest on mortgage, rates & taxes, repairs</i> Please attach separate detailed list or copy of documents where applicable	\$ _____
Sale of property	Sale date: <i>When the sales contract was signed</i> Sale price:	___/___/___ \$ _____
Additional selling costs <i>Refer to settlement statement</i>	Advertising: Agent's commission: Styling fees: Any other selling costs: <i>eg auctioneer, inspection reports, mortgage discharge</i>	\$ _____ \$ _____ \$ _____ \$ _____
Percentage Ownership	Ownership interest: <i>Do you own the property solely under your name, or do you have part ownership with someone else?</i>	_____%
Main Residence Use <i>(if relevant)</i>	Please provide the dates that you lived in the property as your main residence: <div style="text-align: right;"> To: ___/___/___ From: ___/___/___ </div>	
Business Use of Main Residence <i>(if relevant)</i>	Did you use the property for business? Size of area used for business Total area of home	Please circle: Yes / No _____ m ² _____ m ²

Depreciation Schedule & Capital Works Deductions	<p><i>Please provide a copy of any depreciation schedules/capital works deductions claimed in prior year tax returns.</i></p> <p><i>(not required for years where we prepared the returns)</i></p> <p>This includes costs associated with:</p> <ul style="list-style-type: none">- items that are permanently fixed to the property- structural improvements (eg renovations/additions)
Any other relevant information	