

+ Capital Gains Tax Checklist

This checklist outlines the information that is required if you have sold shares or property during the financial year.

SALE OF SHARES

Details of Dividend Reinvestments (DRP). This includes the number of shares issued and price they were issued at, for the whole period of time you held the shares.

Details of any bonus issue. This includes the number of shares issued and the price they were given at.

The Buy and Sell contract. If the you are unable to provide the contracts then the following information will be required:

- Date of purchase and sale**
- Purchase and sale price**
- Number of shares purchased and sold**
- Brokerage on the purchase and sale**

If you have a brokerage account E.g. Commsec or E-Trade, this information can be obtained from a trading history report

SALE OF PROPERTY

- Settlement statement provided by solicitor for purchase and sale of property**
- Stamp Duty on purchase**
- Did you receive First Home Owners Grant? If so how much?**
- Legal fees on purchase and sale**
- Surveyor report costs and other associated fees e.g. building reports**
- Real estate commission**

If the property was used as investment property and owner occupied, we will need the dates it was occupied in both states:

Lived in from . _____ to _____

Rented from _____ to _____

Please also confirm at the time of renting what your current living arrangements were e.g. renting, living with family, purchased a new house etc.

NOTE: Please contact us on 1300 692 228 if you are unsure whether you are eligible for a full or partial exemption from Capital Gains Tax.



Kelly+Partners (Blue Mountains) Pty Ltd

37 Ross Street, Glenbrook NSW 2773

1300 692 228 bmct@kellypartners.com.au

kellypartners.com.au

ABN 17 161 730 490