

## Capital Gains Checklist

Please note this is a basic checklist, for a comprehensive checklist please contact our office at [Admin@woodsaccounting.com.au](mailto:Admin@woodsaccounting.com.au) or on (02) 8824 4277

### Shares

- Purchase Price
- Purchase Date
- Sale Date
- Sale Price
- Brokerage Fees
- Any other Additional Costs
- Commsec, BT etc. Reports if applicable

### Managed Funds

- Purchase Price
- Purchase Date
- Sale Date
- Sale Price
- Brokerage Fees
- Any other Additional Costs
- Commsec, BT etc. Reports if applicable

### Investment Properties

- Purchase Price
- Purchase Date
- Sale Date
- Sale Price
- Legal Costs on Purchase
- Legal Costs on Sale
- Stamp duty
- Commission
- Other Costs Related to the sale or purchase
- Depreciation Schedules if applicable

If not a **Rental Property**, we also require any expenses occurred during the entire period of ownership.

- Rates
- Water
- Strata
- Interest
- Other Expenses