

CAPITAL GAINS TAX CHECKLIST

Real Estate (Non Main Residence)

- Property Purchase Details
 - Address of Property
 - Property settlement statement and real estate contract
 - Stamp duty on purchase of property
 - Legal fees on purchase of property
 - Building and pest inspection report costs
 - 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 re-valuation documents

Shares / Managed Funds and Crypto

- Purchase contract
- Sale contract
- Any brokerage fees paid
- Dividend reinvestment details
- Any Managed Fund tax statements and distribution statements
- Travel to brokers and financial advisors

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