



**Income Tax Return Preparation Checklist**

**2017**

**Checklist C - Sale of Assets**

***Please indicate the type of asset sold:***

1. Shares

2. Managed Fund

3. Investment Property

4. Business

5. Other

Please specify:

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.....

***Shares & Managed Fund:***

**Note 1:** If sale covers multiple purchases please attach a separate list showing all purchase dates, number of shares, cost of shares & brokerage (if any).

**Note 2:** Each dividend re-investment is regarded as a separate purchase (see note 1).

6. Purchase date ...../...../.....

7. Purchase price \$.....

8. No. of shares/units purchased .....

9. Sale date ...../...../.....

10. Sale proceeds \$.....

11. No. of shares/units sold .....

12. Buy & sell brokerage costs (shares) \$.....

## Checklist C - Sale of Assets ...continued

### Investment Property:

**Note 3:** Purchase and sale dates are the purchase and sale contract dates (the date a deposit was paid).

13. Purchase date ...../...../.....

14. Purchase price \$.....

15. Sale date ...../...../.....

16. Sale proceeds \$.....

17. Purchase costs

Legal fees	\$.....
Stamp Duty	\$.....

18. Sale costs

Legal fees	\$.....
Agents commission	\$.....
Advertising costs (not included in agents costs)	\$.....

19. Other - please specify

Please specify:

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### Business & Other Assets:

20. Please indicate above and we will contact you regarding further information.