



Income Tax Return Preparation Checklist

2021

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:
.....
.....

Shares & Managed Fund:

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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:
.....
.....
.....



Business & Other Assets:

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