



Income Tax Return Preparation Checklist

2024

Sale of Assets Checklist

Please indicate the type of asset sold:

1. Shares

2. Managed Fund

3. Investment Property

4. Business

5. Other   
Please specify:  
.....  
.....

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) \$.....