

**PETER LEWIS CHARTERED ACCOUNTANT**

**Capital Gains Checklist 2011**

Did you sell any assets such as share investments or property which were acquired after 20 September 1985?

If yes, then please provide documentation or information for:

<b>Cost Base</b>	<b>Yes</b>	<b>No</b>	<b>Encl</b>	<b>N/A</b>
Purchase Contract	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purchase Price	_____			
Stamp Duty	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Legal Fees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Improvements to property – Renovations, substantial repairs never claimed previously.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other costs associated with purchase	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- details of other _____				
<b>Selling Price</b>				
Sale Contract	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sale Price	_____			
Legal Fees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Real Estate Commission	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expenses in relation to disposal of property	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other costs associated with sale	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- details of other _____				
<b>Dates &amp; Details</b>				
Purchase date	_____			
Sale date	_____			
Date Contract Unconditional	_____			
Dates of when property rented	_____			
Date property began income producing	_____			
Date property ceased income producing	_____			
Date of Principal Place of Residence (PPR)	_____			
Dates & Details of any changes in Principal Place of Residence (PPR)	_____			
	_____			
	_____			
	_____			

**Please note that you are required to forward some or all of the above documents to us for preparing your tax return. If you are not certain whether additional information/documents are required or some of the documents are missing, please feel free to give us a call on 07 3209 8242.**