



Capital Gains Tax Checklist

REAL ESTATE (NON MAIN RESIDENCE)

- Property purchase details:
 - Property settlement statement and real estate contract
 - Stamp duty on purchase of property
 - Legal fees on purchase of property
 - Building & pest inspection report costs
 - Travel fees prior to purchase of property
 - 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 revaluation documents

SHARES AND MANAGED FUNDS

- 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