



CAPITAL GAINS CHECKLIST - PROPERTY

Property Details	<input type="checkbox"/> Address of rental property _____ _____ _____ <input type="checkbox"/> Owner #1 _____ % of ownership _____ % <input type="checkbox"/> Owner #2 _____ % of ownership _____ <input type="checkbox"/> Owner #3 _____ % of ownership _____ % <input type="checkbox"/> Owner #4 _____ % of ownership _____ %
Sale Details	<input type="checkbox"/> Selling price \$ _____ <input type="checkbox"/> Date the property was sold (contract date) ____/____/____
Cost Base - First Element	<i>Costs of acquiring the asset</i> <input type="checkbox"/> Amount Paid \$ _____ <input type="checkbox"/> Market Value of Property Given \$ _____ <input type="checkbox"/> Date the property was purchased (contract date) ____/____/____
Cost Base - Second Element	<i>Incidental costs of acquisition or disposal</i> <input type="checkbox"/> Surveyor, Valuer, Auctioneer, Accountant, Legal Costs \$ _____ <input type="checkbox"/> Stamp Duty \$ _____ <input type="checkbox"/> Transfer Costs \$ _____ <input type="checkbox"/> Conveyancing Costs \$ _____ <input type="checkbox"/> Agent Selling Commission & Advertising costs \$ _____ <input type="checkbox"/> Search Fees \$ _____ <input type="checkbox"/> Borrowing Expenses \$ _____
Cost Base - Third Element <small>(only for assets acquired post 20 August 1991)</small>	<i>Costs of ownership</i> <input type="checkbox"/> Interest on money borrowed to acquire the property \$ _____ <input type="checkbox"/> Costs of maintaining, repairing or insuring the property \$ _____ <input type="checkbox"/> Rates or Land Tax \$ _____ Note: You cannot have already claimed a tax deduction

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Cost Base - Fourth Element	<i>Expenditure incurred to increase the property's value</i> <input type="checkbox"/> Costs to increase or preserve the property's value \$ _____ <input type="checkbox"/> Costs to install or move the property \$ _____
Cost Base - Fifth Element	<i>Expenditure relating to title</i> <input type="checkbox"/> Costs to establish, preserve or defend title to the property \$ _____
Other	<i>Depreciation</i> <input type="checkbox"/> Division 43 (Building Depreciation) \$ _____ - Add back depreciation claimed / claimable
Client Notes	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>