



ACCOUNTING - BOOKKEEPING & PAYROLL - LENDING - FINANCIAL PLANNING - INSURANCE

2023 CAPITAL GAINS TAX RETURN CHECKLIST

PLEASE ALSO REFER TO INDIVIDUAL TAX CHECKLIST AS THIS ONLY RELATES TO CAPITAL GAINS SCHEDULE COMPONENTS

REAL ESTATE (NON-MAIN RESIDENCE)

- ALL** Property Sale documents
- ALL** Property Purchase documents
- Conveyancer or solicitors statement of adjustments for both purchase and sale of property
- Stamp Duty on Purchase
- Legal fees on Purchase and Sale
- Surveyor Reports, Depreciation and Building Reports
- Any sub-division documents
- Any other holding costs never claimed in returns

REAL ESTATE (USED AS MAIN RESIDENCE)

- Date timeline of main residence / non-main residence
- If first used as main residence*, Agent Market Appraisal or Valuation at time of ceasing as main-residence
- If main residence over 2 Hectares / 5 Acres*, Quantity Surveyor report showing property value breakdown
- If main residence used as deductible place of business*, date timeline & area claimed for use as business

CRYPTO CURRENCY (i.e BITCOIN)

- ALL** Crypto Sale documents **FOR YEAR ENDING 30 JUNE 2023**
- ALL** Crypto Purchase documents for above transactions

SHARES

- Share Purchase & Sale contracts **PLEASE PROVIDE HIN/SRN**
- Any Bonus Share Issue documents
- Any Dividend Reinvestment (DRP) statements
- Any Share Buy-back, Takeovers, Rights Offers, Share Placements and Capital Return documents
- Employee Share Scheme Rulings and Offer documents
- Financial Broker/Advisor and Holding Cost tax invoices

MANAGED FUNDS & INVESTMENTS

- Managed Fund Tax Statements and Distributions
- Investment Strategy, Financial Planner Statement of Advice
- Bank Statements if solely for Managed Investments
- Any other related fees (i.e. legal, solicitor, subscriptions)

COLLECTABLES GAINS ONLY ON PURCHASES OVER \$500

- ALL** Sale and Purchase documents
- Collectables include:** Paintings, Drawings, Jewellery, Antiques, Coins, Stamps, Trading Cards, Medallions.

PERSONAL USE ASSETS GAINS ONLY PURCHASES OVER \$10,000

- ALL** Sale and Purchase documents
- Personal Use Assets include:** Boats, Electrical Goods, Caravans, Furniture, Electrical Goods, Household items

OUR WIDE RANGE OF IN-HOUSE SERVICES CAN ASSIST YOUR BUSINESS WITH ANY ENQUIRY

BOOKKEEPING & PAYROLL



FINANCIAL PLANNING



MORTGAGE BROKING



INSURANCE



Please ensure you also provide BSB and ACCT NO for ATO Refunds



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