CGT Checklist

Please use the checklist below to provide us with all the listed documentation.

Purchase

- ☐ Contract
- ☐ Settlement Statement

If not shown on the Settlement Statement provide:

- ☐ Stamp Duty
- ☐ Legal Fees

Sale

- ☐ Contract
- ☐ Settlement Statement

If not shown on the Settlement Statement provide:

- ☐ Legal Fees
- ☐ Agent Fees/Commission
- ☐ Marketing Fees

Please complete the following table to outline the timeline of this property. This will provide us with more information to establish the correct Capital Gain. We have put an example below to assist you.

Date	Description

EXAMPLE ONLY

Date	*Description*
01/02/2022	*Purchased property and moved in*
02/05/2022	*Moved to Brisbane and started renting this property out.*
05/06/2023	*Moved back into this property.*
01/07/2023	*Sold property*

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HEAD OFFICE:
Suite 3-7, Level 5
Tower 2, 55 Plaza Parade
Maroochydore QLD 4558
P: 1300 49 11 41
E: tax@faa.net.au
ABN: 54 626 392 470