

PROPERTY CAPITAL GAINS TAX RETURN CHECKLIST

SALE DOCUMENTATION

- Sales Contract for the sale of the property, including all special provisions (if any)
- Conveyancing Documentation including, Statement of Adjustments / Settlement Statement and Invoice.
- Agency invoice for services and movement via their trust account.

PURCHASE DOCUMENTATION

- Purchase Contract for the sale of the property, including all special provisions (if any)
- Conveyancing Documentation including, Statement of Adjustments / Settlement Statement and Invoice.
- Depreciation schedule prepared when first purchased (if any)

ISSUES TO CONSIDER

These issues can apply to your circumstances

Timeline

- Dates the property was rented (from date and to date)
- Dates the property was not rented (from date and to date)
- Dates the property was used as your principle place of residence (from date and to date)
- Dates the property was used in the running of a business (f from date and to date)
- Other property holdings and their timeline. You should supply the above for those properties as well.

Depreciation Claims

- Has depreciation been claimed through the periods the property has been rented, bring those returns not prepared by SNA Advisory
- Were there additional asset and/or improvements that were made that were not claimed on. Please bring documentation to effect those claims.

For further information, please feel free to contact our office today.



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