

TROIANO&ASSOCIATES

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Capital Gains – Cost Checklist

Capital Gains on PROPERTY

Address of property sold	
Date the PURCHASE contract was signed/...../.....
Purchase cost of the Investment Property	\$
Purchase costs involved:	\$
– Legal fees – Statement of Adjustment/Settlement	\$
– Stamp duty	\$
– Buyers agent costs	\$
– Building & pest inspections	\$
– Other	\$
Date of SALE CONTRACT/...../.....
Sale Price	\$
Costs involved with sale:	\$
– Legal fees – Statement of Adjustment/Settlement	\$
– Real estate agent costs	\$
– Real estate marketing costs	
– Other	\$
Other relevant information	
Approximate dates when rented out	
Approximate dates as a main residence	
Any sub-division documents	
Any revaluation documents	

Capital Gains on SHARES

Name of shares sold:	
Date of ORIGINAL PURCHASE of Shares/...../.....
Number of shares acquired	
Purchase cost of the shares	\$
Purchase costs involved:	\$
– Brokerage Fees	\$
– Other	\$
Date of SALE of the Shares/...../.....
Number of shares sold	
Sale price	\$
Sale costs involved:	\$
– Brokerage Fees	\$
– Other	\$
Other relevant information	

- Capital Gains are calculated using the CONTRACT date and not the Settlement date.
- Please provide one schedule for each property sold or each company's shares sold.