Capital Gain on Real estate Worksheet

Sale & purchase details

Complete one form per property sold. If unsure, leave blank and attach the relevant document.

Client name / reference

Property reference / income year (if known)

Property address (include country)

Property type / land area (if known)

Contact email / phone

Owners - list everyone on the title

Full name	Ownership %	Date acquired

Changes in ownership, gifts, inheritance or transfers (attach details if applicable)

Purchase

Purchase contract date (DD/MM/YYYY)

Purchase settlement date (DD/MM/YYYY)

Purchase price for the whole property

Currency (if not AUD)

Sale

Sale contract date (DD/MM/YYYY)

Sale settlement date (DD/MM/YYYY)

Sale price for the whole property (before costs)

Currency (if not AUD)

Use the contract sale price, not the cash remaining after your mortgage is repaid.

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Purchase costs, sale costs & improvements

Enter whole-property costs from your records. Your tax agent will determine which amounts can be included.

Client name / reference	Property reference / income year (if known)

Purchase and sale costs

Cost item	Amount / currency	Invoice / record reference
Purchase stamp duty / transfer duty		
Purchase legal / conveyancing fees		
Purchase title / registration / search fees		
Buyer agent / other acquisition costs		
Sale agent commission		
Sale advertising / marketing / auction fees		
Sale legal / conveyancing fees		
Other sale costs (describe in notes)		

Renovations, improvements and other major costs during ownership

Description	Date	Amount	Claimed before?

For "Claimed before?", enter Yes, No or Unsure. Attach invoices and prior depreciation reports.

Other costs, reimbursements, grants or settlement adjustments (attach details)

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How the property was used

Include the full ownership period. These details help your tax agent assess any main residence treatment.

Client name / reference

Property reference / income year (if known)

Property use timeline - attach another sheet if needed

From date	To date	Use: home / rented / vacant / other	Part used / notes

Date you first moved into this property (if ever)

Date first rented / used to earn income

Valuation at first income use (if available): date / value

Other property valuations: date / reason

Did you or your spouse have another home during this period? Give addresses and dates.

Periods living overseas / changes in Australian tax residency: dates and details (or "None").

Any business use, partial rental, subdivision, demolition, rebuilding or related-party sale?

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Documents & additional information

Attach available records. You do not need to calculate the capital gain or any CGT discount.

Client name / reference

Property reference / income year (if known)

Documents attached - tick what you are providing

- ☐ Purchase contract and settlement statement
- ☐ Sale contract and settlement statement
- ☐ Purchase costs / stamp duty records
- ☐ Sale commission and legal invoices
- ☐ Renovation / improvement invoices
- ☐ All available depreciation schedules
- ☐ Prior rental schedules / tax workpapers
- ☐ Property valuation reports (if available)
- ☐ Title / ownership or inheritance records
- ☐ CGT withholding / clearance documents

Capital works / depreciation claimed in earlier years: details or accountant contact (if known).

Tax withheld from sale proceeds (if any): amount

Withholding receipt / clearance certificate reference

Any property costs not claimed as rental deductions? List them or attach a summary (if known).

Other asset sales or carried-forward capital losses: attach records if available.

Missing documents or anything else we should know

Office use only

Prepared / reviewed by and date

CGT calculation / Xero Tax workpaper reference

Reference: ato.gov.au/cgtguide | Information collection only; tax treatment requires agent review.