

## **Sale Of Property Checklist**

This checklist will assist us to prepare your tax return and/or advise you on tax consequences of a sale of a property. The more detail you provide the better.

Address of Property

Date of Contract for Purchase

Date of settlement of purchase

Date of Contract for Sale

Date of Settlement of Sale

Primary use of Property

Please complete the table below where at any time the property was NOT used for the primary purpose noted above

Start Date	End date	Purpose

Financial Details Required

Document	Attached
Solicitors settlement letter for Purchase	
Stamp Duty on purchase	
Legal fees on purchase	
Solicitors settlement letter for Sale	
Commission paid on sale	
Legal fees on sale	
Details of renovations/Improvements made to property during period of ownership (excluding amounts claimed as rental property repairs)	

In some circumstances we will also need all holding costs such as Rates, Water bills, Repairs (including lawn mowing) Insurance and Interest on loans used to acquire the property (these costs will apply if the property was not used for income producing purposes and not a main residence and in some other circumstances – we will let you know if we need these details)