



EDEN
wealth accountants

TAX CHECKLIST

Name(s): _____

> *Asset Sale*

Please complete and:
- Mail to PO Box 99, Canterbury VIC 3126;
- Visit us at Suite 1, 235 Camberwell Road, Hawthorn East VIC 3126; or
- Scan and email to Admin@EdenWealth.com.au

Eden Wealth Accountants – Asset Sale Schedule

IMPORTANT: Please provide copies of **Original Purchase Documents** and **Sale Documents**. For investments in shares this would be Buy & Sell Contracts. For Investment properties this would be contracts of Purchase & Sale along with notes of adjustments and associated legal costs.

Description of Asset Sold: _____	Asset Owner (inc. % owned):	_____
Purchase Cost: _____	Purchase Date:	_____
Sale Proceeds: _____	Sale Date:	_____

Additional Holding Costs: Did you incur any additional holding costs with regards to investment sold? Legals, fees, call's etc etc. If so please provide **receipts/invoices** for associated costs. Y / N (please circle)

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Purchase Cost: _____	Purchase Date:	_____
Sale Proceeds: _____	Sale Date:	_____

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