# Sandison Lang: **Checklist for CGT due on sale of property**

**Please complete this form fully and enclose supporting documents where possible to help us prepare your CGT calculations.**

Please note, HMRC rules state that the CGT report must be completed, submitted and any tax charges paid within 60 days of the property sale completion.

## Purchase:

Date of acquisition

How was property acquired? (e.g. purchased / inherited / gifted)

Amount paid or value at acquisition

Stamp duty on purchase

Legal fees on purchase

Any other costs associated with purchase

Copy of the completion statement enclosed? Yes / no

## Sale:

Date of exchange

Date of completion

Sale proceeds

Costs of sale

Estate agent fees

Solicitors fees

Any other costs (e.g. Energy Performance Certificate)

Copy of the completion statement enclosed? Yes / no

## General:

Full address of the property

Details of ownership (e.g. sole or joint purchase and split of ownership)

Was the property a main residence? Yes / no

If yes, the dates it was lived in

Was the property a main residence and a room was let while being owner occupied? Yes / no

If yes, the dates the room was let while the residence was owner occupied

Details of any improvement works, such as extension, room conversion, lease extension
(please supply dates and costs of works plus submit copies of any supporting documents)