



# EL DORADO

## BUSINESS SERVICES P/L

[www.ebs-tax.com.au](http://www.ebs-tax.com.au)

Mobile: 0400 35 3690

## Sale of Shares/FX or Crypto Units - Questionnaire

<b>CLIENT NAME:</b>		<b>CLIENT SIGNATURE:</b>	
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A capital gain - or capital loss - is the difference between what it cost you to get an asset and what you received when you disposed of it.

You pay tax on your capital gains. It's not a separate tax, just part of your income tax, although it is generally referred to as capital gains tax (CGT).

If you make a capital loss, you cannot claim it against income but you can use it to reduce a capital gain in the same income year. If your capital losses exceed your capital gains or you make a capital loss in an income year you don't have a capital gain, you can generally carry the loss forward and deduct it against capital gains in future years.

All assets you've acquired since tax on capital gains came into effect (on 20 September 1985) are subject to CGT unless specifically excluded.

Selling assets such as real estate or shares is the most common way you make a capital gain or capital loss. CGT also applies to intangible assets such as business goodwill.

Some of your main personal assets are exempt from CGT, including your home, car, and most personal use assets, such as furniture. CGT also doesn't apply to depreciating assets used solely for taxable purposes, such as business equipment or fittings in a rental property.

If you're an Australian resident, CGT applies to your assets anywhere in the world.

SHARES or CRYPTO UNITS					
Details (e.g. shares)	No. shares /units	Date Purchased	Total Purchase Price	Date Sold	Total Sale Price
Provide a csv (Excel) file from your CRYPTO or Share Trading platform, showing the above details Please contact me for any clarification needed			\$		\$