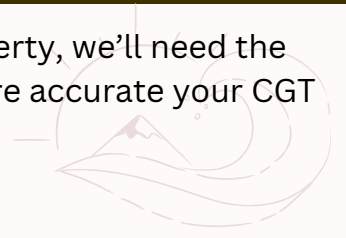


CGT on Property Sale

Client Information Checklist

To help us work out your Capital Gains Tax position on the sale of your property, we'll need the following information. The more detail you can provide, the quicker and more accurate your CGT calculation will be.



Property Details

- Full address of the property
- Type of property (residential, commercial, land, mixed-use)
- Date you acquired the property
- How the property was acquired (purchase, gift, inheritance, transfer)
- Whether it has ever been your main residence
- Whether you have ever rented it out or used it for business purposes

Purchase Information

- Original purchase price
- Completion statement from when you bought the property
- Stamp Duty Land Tax (SDLT) paid (or equivalent)
- Legal fees, survey fees, and other professional costs at purchase
- If inherited:
 - Probate valuation
 - Date of death
- If gifted:
 - Market value at date of gift

• Sale Information

- Final sale price
- Completion statement from the solicitor
- Estate agent fees
- Legal fees related to the sale
- Any other costs directly linked to the sale

Capital Improvements (Enhancement Costs)

Please provide details and evidence of any capital improvements, such as:

- Extensions
- Conversions (e.g., loft or garage)
- Structural changes
- New kitchens/bathrooms if they replaced rather than repaired
- Important: Repairs and maintenance (e.g., painting, replacing like-for-like, fixing leaks) do not qualify.

For each improvement, provide:

- Date
- Description of work
- Cost
- Invoices or receipts (ideally)

Periods of Occupancy and Letting

- Dates you lived in the property (with supporting evidence if possible)
- Dates the property was rented out
- Rental income declarations (if applicable)
- Periods the property was empty
- Confirmation if any part of the property was used for business

Ownership Structure

- Whether the property was jointly owned
- If so: names of all owners and ownership percentages
- Marital status during ownership (for main residence or transfers)

Annual Exemptions and Other Assets

- Confirmation if you have any other capital gains in the same tax year
- Confirmation if you have unused capital losses carried forward from previous years
- Whether you are UK resident for tax purposes in the year of sale

Additional Documents (if relevant)

- Mortgage redemption statement (if useful for timeline, not for CGT calculation)
- Any previous valuations
- Planning permission or building certificates for improvements
- Evidence of periods abroad if affecting residency

Post-Sale Requirements

To file the CGT on UK Property Return within 60 days (if UK residential property and gain arises), please provide:

- National Insurance number
- Government Gateway login (or confirm if you need one setting up)

What Happens Next:

Just send us the details from the checklist when you're ready. We'll then work out your CGT position, check for any reliefs, and let you know if a 60-day return is needed.

If anything on the list doesn't make sense, get in touch — we're happy to help.

