

## Property Disposal – Information Required

### Documents from the time of purchase of property that has been sold during the year ended 30 June 2024:

- Statement of Adjustments from the purchase of the property.
- Stamp duty on purchase of property
- Legal fees on purchase of property
- Building & pest inspection report costs
- Initial loan statement for mortgage
- Depreciation report

### Documents from the time of purchase of property that has been sold during the year ended 30 June 2024:

- Statement of Adjustments from sale of the property
- Legal fees on sale of property
- Real estate commission fees
- Advertising and staging fees
- Loan statement for the mortgage of this property for the last 12 months
- Other expenses you may have incurred during the sale such as electricity, gas, water, council rates and landlord insurance etc.
- Any repairs or maintenance carried out before sale of property



## Shares Purchase/Disposal – Information Required

### Commsec

1. Login to your Commsec account
2. Navigate to the confirmation page under the Trading tab
3. Select the account you want to import from the dropdown list
4. Select the date range (01/07/2018 – 30/06/2024)
5. Click Search
6. Click the Download CSV link
7. Email us the CSV File

### ANZ

1. Login to your ANZ Share Investing account
2. Navigate to your trading account
3. Click **Confirmations** in the **Account** dropdown menu
4. Select the date range of trades from the dropdown menu (01/07/2018 – 30/06/2024)
5. Select the file format of **Excel (CSV)**
6. Click the **Download** button
7. Email us the CSV File

### Westpac

1. Login to your Westpac account
2. Navigate to **My Portfolio**
3. Navigate to **Holdings & Accounts**
4. Select the **Transactions** tab and enter the date range (01/07/2018 – 30/06/2024)
5. Click **Download CSV**
6. Email us the CSV file

For all other platforms please contact your service provider for instructions. We will generally require all buy/sell transactions in a CSV format or an Annual Report showing Capital Gains/Loss for the year.

## Cryptocurrency Purchase/Disposal – Information Required

### Coinspot

1. Log in to CoinSpot on your computer
2. On the top right of the navbar, click on the profile icon
3. In the dropdown selection click on 'Order History' to navigate to the order history page (<https://www.coinspot.com.au/my/orders/history>)
4. Click on the '**Sends/Receives CSV**' button to download your send and receive history. This will download a CSV file with the name 'sendreceives.csv'
5. Click on the '**Buys/Sells CSV**' button to download your order history file. This will download a CSV file with the name 'orderhistory.csv'
6. Email us the CSV file

### Binance

1. Sign in to your Binance account and click on Wallet > Overview on the navigation bar
2. Next click on 'Transaction History' (in the top right corner)
3. Now click on 'Generate all statements' (in the top right corner)
4. On 'Range' select 'Customize' and enter the start/end date (max 3-month history can be downloaded at a time)
5. Make sure the 'Hide transfer record' option is checked
6. Click on 'Generate' and wait for the report to be generated - this may take some time
7. Repeat these steps to generate exports for the entire duration you have been trading on Binance
8. If the file is a '.zip' or '.tar.gz' format you will need to extract the contents of the compressed folder first before uploading, please refer to the notes below for guidance
9. Email us the extracted files

For all other platforms please contact your service provider for instructions. We will generally require all buy/sell transactions in a CSV format or an Annual Report showing Capital Gains/Loss for the year.