



CHARTERED
PROFESSIONAL
ACCOUNTANTS

7190 Lantzville Rd, PO Box 70
Lantzville, BC V0R 2H0
t: 250.390.4131
e: info@kmacpa.ca
www.kmacpa.ca

REAL ESTATE CHECKLIST

You must report **any** property sold by you, or that you changed the use of, located any where in the world.
Please note this is not limited to just Canadian property.

You **only** need to complete this checklist if you sold or changed the use of Real Estate in the calendar year. If you have had more than one transaction in the year, then please complete a separate sheet for each piece of Real Estate.

- YES **1) Did you sell real estate in the past year?**
NO Real estate includes homes, condominiums, apartments, vacant lots, co-op units, timeshare units, etc
- YES **2) Did you transfer or gift some or all of the title to a piece of real estate?**
NO For example:
Did you add someone to title?
Did you take someone off title?
- YES **3) Did you change how you used a piece of real estate?**
NO Change in use means that you changed how you used the real estate.
For example:
Changing from renting the property to owning the property as your principal residence.
Changing from regular monthly rental, to a short-term rental such as a Bed and Breakfast or AirBNB

If you answered "yes" to any of the above questions, please provide the following information:

Your name: _____
Property street address: _____
City: _____
Province/State: _____
Postal or Zip: _____
Country: _____
Date of sale or change: _____

For each property sold please answer the following questions:

Ownership

Were you the sole owner? YES NO

If "no", please provide the following details:

Name of other people, or company(ies) on title:

Name 1: _____

Name 2: _____

Name 3: _____

Name 4: _____

Name 5: _____

Add any additional owners in the notes section below.

Sale Information *(Please submit copies of the sale documents with this checklist)*

Date of sale: _____

Sale Price: _____

Closing Costs: _____

Did you take a mortgage back from purchaser? YES NO

Did you sell the furnishings with the property? YES NO

Purchase Information *(Please submit copies of the purchase documents with this checklist)*

Year of purchase: _____

Amount paid: _____

Purchase currency: _____

Did you do any major additions or renovations? YES NO

If "YES", please provide details:

Principal Residence

YES NO Have you ever lived in the property that you sold?

YES NO Did you occupy this property for the whole period of ownership?

YES NO During the period of ownership, did you own and occupy, for any period of time, another property?

YES NO Have you ever rented out the property?

If "Yes", please indicate when and for how long: _____

YES NO Extra: Did you live in the house and rent out just a portion, even if for a short amount of time?

Additional Notes: