

# Capital gains tax (CGT) schedule

**2007**

RN 543BK07

Use in conjunction with company, trust or fund income tax return. For instructions on how to complete this schedule refer to the publication *Guide to capital gains tax*.

Print neatly in BLOCK LETTERS with a black or blue ballpoint pen only. Do not use correction fluid or tape. Print one letter or number in each box.

Tax file number (TFN) Taxpayer's name Australian business  
number (ABN) 

Signature as prescribed in tax return

## Part A Capital gains from CGT assets and CGT events

### Non-active assets

	Capital gains-indexation method	Capital gains-discount method	Other capital gains
Shares and units (in unit trusts)	<b>A</b> <input type="text"/>	<b>B</b> <input type="text"/>	<b>C</b> <input type="text" value="31,536"/>
Real estate	<b>D</b> <input type="text"/>	<b>E</b> <input type="text"/>	<b>F</b> <input type="text"/>
Other CGT assets and any other CGT events	<b>G</b> <input type="text"/>	<b>H</b> <input type="text"/>	<b>I</b> <input type="text"/>
Collectables	<b>J</b> <input type="text"/>	<b>K</b> <input type="text"/>	<b>L</b> <input type="text"/>

### Active assets

Shares and units (in unit trusts)	<b>M</b> <input type="text"/>	<b>N</b> <input type="text"/>	<b>O</b> <input type="text"/>
Real estate	<b>P</b> <input type="text"/>	<b>Q</b> <input type="text"/>	<b>R</b> <input type="text"/>
Other CGT assets and any other CGT events	<b>S</b> <input type="text"/>	<b>T</b> <input type="text"/>	<b>U</b> <input type="text"/>

Add amounts at A to S above and  
write the total at V below.Add amounts at B to T above and  
write the total at W below.Add amounts at C to U above and  
write the total at X below.**Total current year  
capital gains (CYCG)** **V** **W** **X** **F**

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Taxpayer name ELIZABETH COOKE SUPERANNUATION FUND

TFN 845 385 304

**Part B Current year capital losses (CYCL) from CGT assets and CGT events - other than capital losses from collectables**Shares and units (in unit trusts) **A** Real estate **B** Other CGT assets and **C** 

any other CGT events

Add amounts at A to C above and  
write the total at D below.**Total current year** **D** 

capital losses (CYCL)

**Part D Applying capital losses against current year capital gains****Capital gains-indexation method**Current year capital losses applied **E** Prior year net capital losses applied **I** Capital losses transferred in applied **M** Add amounts at E to M above and  
write the total at Q below.**Total capital losses applied** **Q** **Capital gains-discount method****F** **J** **N** Add amounts at F to N above and  
write the total at R below.**R** **Other capital gains****G** **K** **O** Add amounts at G to O above and  
write the total at S below.**S** **Current year capital losses  
applied**Add amounts at E, F and G above  
and write the total at H below.**Total capital losses applied** **H** **Prior year net capital losses  
applied**Add amounts at I, J and K above  
and write the total at L below.**L** **Capital losses transferred in  
applied**Add amounts at M, N and O above  
and write the total at P below.**P** Use only for capital losses  
transferred in and applied involving  
Australian branches of foreign  
banks.

F

**Part E Current year capital gains (CYCG) after applying capital losses****Capital gains-indexation method**Non-active assets **A** Active assets **D** Add amounts at A and D above  
and write the total at G below.**Totals - CYCG after** **G** 

applying capital losses

**Capital gains-discount method****B** **E** Add amounts at B and E above  
and write the total at H below.**H** **Other capital gains****C**  31,536**F** Add amounts at C and F above  
and write the total at I below.**I**  31,536

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**Part F Applying the CGT discount on capital gains****Capital gains-discount method**

From non-active assets

**J**

From active assets

**K****Part G Applying the CGT concessions for small business****Capital gains-indexation method****Capital gains-discount method****Other capital gains**

Small business active asset reduction

**L****M****N**

Small business retirement exemption

**O****P****Q**

Small business roll-over

**R****S****T**

F

**Part H Calculating net capital gain**

Add amounts at L to R above and write the total at A below.

Add amounts at J to S above and write the total at B below.

Add amounts at N to T above and write the total at C below.

**Totals-CGT discount and small business concessions****A****B****C**

Deduct the amount at A above from the amount at G in part E on page 2 and write the result at D below.

Deduct the amount at B above from the amount at H in part E on page 2 and write the result at E below.

Deduct the amount at C above from the amount at I in part E on page 2 and write the result at F below.

**D****E****F****Net capital gain (D + E + F)****G**

Transfer the amount at G to A on your tax return.

**Part I Unapplied net capital losses (UNCL) carried forward to later income years**

UNCL from collectables

**H**

UNCL from all other CGT assets and CGT events

**I**

Add amounts at H and I and write the total at V on your tax return.

**Part J Small business 15-year exemption**

Exempt capital gains

**J**

CGT asset or CGT event code

**K**

F

**Part K Scrip-for-scrip roll over for exchanging taxpayer**

Roll over chosen?

**A**

Yes

☐

No

☒

Original interests cost base

**B**

Replacement interests market value

**C**

Cash and other considerations

**D**

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**Part L Scrip-for-scrip roll over for acquiring entity - to be completed by companies and trusts only**

Acquiring entity **E** Yes ☐ No ☒ Print X in the appropriate box

Number of original entities **F**

Taxpayer TFN of original entity **G**

Number of shares units etc issued **H**

Number of options/rights etc issued **I**

Amount of other considerations **J**

First element of cost base of interests acquired **K**

Joint choice for roll over **L** Yes ☐ No ☒ Print X in the appropriate box

Cost base-significant common stakeholder interests acquired **M**

**Part M Did you have an employee share scheme in place at any time during the year? - to be completed by companies only**

**N** Yes ☐ No ☒ Print X in the appropriate box

**Part N Same majority underlying ownership and pre-CGT assets-Division 149 - to be completed by companies only**

**O** Yes ☐ No ☒ Print X in the appropriate box **F**