


# CAPITAL GAINS/LOSSES WORKSHEET

LAST NAME	FIRST NAME	TAX YEAR YYYY
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## STOCKS OR MUTUAL FUNDS

When you sell a stock or mutual fund outside of your RRSP or TFSA you must claim the gain or loss on this transaction.

 Please provide a copy of your T5008 from your financial institution.


**IF** you did not receive a T5008, please provide the following information for each stock or fund you sold.

	AMOUNT Paid when purchasing	AMOUNT Received on sale	GAIN OR LOSS
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
<b>TOTAL</b>	\$	\$	\$

## INTEREST PAID

If you borrowed money to purchase investments, please total the amount of interest paid on the investment loan and attach the statements showing the interest paid.

	AMOUNT
	\$
	\$
	\$
	\$
	\$
<b>TOTAL</b>	\$

 Please submit statements supporting your transactions to us.



**BRIAN PETERSEN**  
MBA, CPA, CMA, CFP  
TAX SERVICES YOU CAN TRUST

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