CGT Summary

	Name of client		Mr X				
All details are input in Light Blue boxes	Name of investment	2nd Prop.(1)	Gain/Loss	Amount	Tax Year	2024/25 🗸	
	ABC Shares	No 🗸	Gain 🗸	11,000.00			
1. Input name of investment	Outer Mongolia	No 🗸	Loss 🗸	3,300.00	Total Gain (or -Loss)	£28,000.00	
 Select 'Y' (from dropdown list) if investment <u>is</u> 2nd property subject to higher rates of CGT. Otherwise select 'N' from dropdown list 	8 Meirose Place	Yes 🗸	Gain 🗸	20,300.00	Losses from previous years	5,000.00	
		No 🗸	Gain 🗸	0.00	Total capital gain (or -Loss to carry forward) £23,000.00		
		No 🗸	Gain 🗸	0.00			
		No 🛩	Loss 🛩	0.00	Annual Exemption available	£3.000.00	
	i i i i i i i i i i i i i i i i i i i	No 🗸	Gain 💙	0.00	Taxable Gain	£20,000.00	
3. Select from dropdown list whether investment made a Gain or a Loss		No 🗸	Gain 🗸	0.00			
		No 💙	Gain 🗸	0.00	Total income	45,270.00	
4. Input Gain or Loss amount (always positive figure even for a loss)	(No 🗸	Gain 🗸	0.00			
		No 🗸	Gain 🗸	0.00			
Will then calculate; • Total Gain or Loss		No 🗸	Gain 🗸	0.00	Without Pension Contribution		
	1	No 🗸	Gain 🛩	0.00	Total "adjusted" income £45,270.00		
		No 🗸	Gain 🗸 🗸	0.00			
	()	No 🗸	Gain 🗸	0.00	Capital Gains Tax Sability £3,860.		
		No 🗸	Gain 💙	0.00			
		No 🗸	Gain 🗸	0.00	With Pension Contribution	40	
		No 🗸	Gain 🗸	0.00	Griss pension contribution by individual	15,000.00	
		No 💙	Gain 🗸	0.00	Total "adjusted" income (2)	£30,270.00	
		No 🗸	Gain 🗸	0.00			
		No 🗸	Gain 🗸	0.00	Capital Gains Tai Sability	£2,720.00	
				£28,000.00	Effective tax relie on pension contribution is 27.6%	k	
5. Select tax year from dropdown list	6. Input any losses carried over from previous tax years7. Input total incomposition			Input total income	e 8. Input pension contri individual	bution paid by	
Will be used to calculate CGT AE available for that year, and Also shows total Gain or Loss	Will then calculate; • Chargeable Gain or Loss, and • Taxable Gain			ill then calculate (otal 'adjusted' inc CGT liability.	(w/o pen cont.); come, and • Total 'adjusted' incon	Will then calculate (with pen cont.); • Total 'adjusted' income, • CGT liability, & effective tax relief	