

Standard Capital Gains Tax Statement

Investor Name: John Doe
Tax Identification No: 123-45-6789
Reporting Year: 2023
Statement Date: 30-Jan-2024
Account Number: 001234567890

1. Summary of Capital Gains and Losses

Type	Short-Term (Held < 12 months)	Long-Term (Held ≥ 12 months)	Total
Proceeds	\$12,500	\$35,000	\$47,500
Cost Basis	\$10,000	\$29,800	\$39,800
Net Gain/Loss	\$2,500	\$5,200	\$7,700

2. Detailed Transactions

Date Acquired	Date Sold	Security	Quantity	Proceeds	Cost Basis	Gain/Loss	Term
2022-11-10	2023-07-25	ABC Corp	200	\$8,000	\$6,400	\$1,600	Short-Term
2022-03-01	2023-06-10	XYZ Ltd.	150	\$4,500	\$3,600	\$900	Short-Term
2021-01-15	2023-08-18	DEF Tech	100	\$10,000	\$7,000	\$3,000	Long-Term
2019-10-30	2023-10-02	LMN Inc.	250	\$25,000	\$18,200	\$6,800	Long-Term
2023-04-20	2023-08-02	PQR Corp	90	\$1,000	\$1,800	-\$800	Short-Term

3. Important Notes

- This statement is for your records and for use in preparing your annual tax return.
- Capital gains are classified as short-term if held for less than 12 months; otherwise, they are long-term.
- Verify all transactions and cost basis information before including values in your tax filing.
- Consult a tax advisor for guidance on deductions for capital losses and for further clarification.
- This document does not constitute legal or tax advice.