

Short-term vs Long-term Capital Gains Statement

Transaction Date	Asset Description	Purchase Date	Sale Date	Holding Period	Cost Basis	Sale Proceeds	Capital Gain Type	Gain/Loss
2024-03-15	Company ABC Stock	2023-10-10	2024-03-15	5 months	\$2,000.00	\$2,450.00	Short-term	\$450.00
2024-02-10	Company XYZ Stock	2021-06-25	2024-02-10	2 years 8 months	\$1,600.00	\$2,500.00	Long-term	\$900.00
2024-04-03	ETF 123	2023-05-30	2024-04-03	10 months	\$3,000.00	\$2,700.00	Short-term	-\$300.00
2024-01-29	Bond LMN	2019-01-10	2024-01-29	5 years	\$5,000.00	\$5,100.00	Long-term	\$100.00

Summary

	Total Gains	Total Losses	Net Gain/Loss
Short-term	\$450.00	\$300.00	\$150.00
Long-term	\$1,000.00	\$0.00	\$1,000.00

Important Notes

- Short-term capital gains are from assets held for 1 year or less and are taxed at ordinary income rates.
- Long-term capital gains are from assets held for more than 1 year and generally receive preferential tax rates.
- Confirm all dates and calculations against your broker’s statements before filing taxes.
- This statement is for reference only; consult your tax advisor for personalized advice.
- Capital gains and losses may be subject to different rules based on your tax residency status and asset type.