

Capital Gains Statement

Taxpayer Name: John Doe

Tax Year: 2023

Short-Term Capital Gains (Assets held < 1 year)

Date Acquired	Date Sold	Description	Cost Basis (\$)	Sale Proceeds (\$)	Gain/Loss (\$)
2023-02-10	2023-08-05	ABC Corp Stock - 50 Shares	2,500	3,100	600
2023-03-15	2023-06-12	XYZ ETF - 10 Shares	1,200	1,000	-200
Total Short-Term Gain/Loss					400

Long-Term Capital Gains (Assets held ≥ 1 year)

Date Acquired	Date Sold	Description	Cost Basis (\$)	Sale Proceeds (\$)	Gain/Loss (\$)
2021-06-20	2023-07-10	LMN Mutual Fund - 100 Units	4,500	5,800	1,300
2022-01-05	2023-09-25	PQR Bonds - 10 Units	1,000	900	-100
Total Long-Term Gain/Loss					1,200

Summary

Type	Gain/Loss (\$)
Short-Term Capital Gain/Loss	400
Long-Term Capital Gain/Loss	1,200
Total Net Capital Gain/Loss	1,600

Important Notes

- Short-term gains are typically taxed at higher ordinary income tax rates.
- Long-term gains benefit from preferential tax rates; consult current tax brackets.
- Document all acquisition and sale dates to ensure correct classification.
- Net losses up to the annual limit may be deductible against other income; excess may be carried forward.
- Review this statement for accuracy before tax filing; consult a tax advisor if needed.