

2 Minute Capital Gains Tax Health Check

		All OK	Needs attention	Urgent!
1.	Have you reviewed all business and personal assets recently and do you know what your CGT liability is on disposal?	Yes	Don't know	No
2.	Have you planned for use of your annual exemption?	Yes	Don't know	No
3.	Have you considered holding assets personally rather than in the business?	Yes	Don't know	No
4.	Have you reviewed personal and business reliefs and exemptions?	Yes	Don't know	No
5.	Have you thought about using Trust Structures to minimise tax liabilities?	Yes	Don't know	Definitely not
6.	Have you looked at alternative asset holding vehicles (e.g. Pension funds)	Yes	Would like to review	Definitely not
7.	Have you reviewed whether any other elections could benefit you?	Yes	Don't know	No

Action Points

		Completed
1.		
2.		
3.		
4.		
5.		
6.		
7.		