

For financial advisers only

# Our capital gains tax tool – helping you manage profit

Our capital gains tax (CGT) reporting tool gives you the information you need to manage your client's CGT liabilities for general investment accounts through Aegon Retirement Choices and the Aegon Platform.



## Easy to track profit and loss

Simple visual layout and intuitive navigation.



## Carry out enhanced 'what-if' scenario planning

Check the potential CGT impact before placing a trade.



## Enables CGT calculations

Provides the data for CGT planning and tax calculations.



## Client-facing reports

Easy to read reports, designed especially for your clients.  
Download to Microsoft Excel or as a print-ready PDF.



## Bespoke paraplanner view

Gives access to client information on behalf of advisers.

# Six sections of the CGT tool



**Scenarios**  
Analyse the impact of potential sales on your client's existing CGT position.

**Transfers**  
Manage the taxable status of asset transfers between clients.

**Reports**  
Generate realised gain and unrealised gain reports.

**Dashboard**  
Gives an overview of realised gain, unrealised gain and the current market value.

**Valuation**  
Provides a view of the profit status of each asset held.

**Cost-base enquiry**  
Drill down to see the basis for the gains/losses shown.

## Historical cost base

Lets you enter the original cost of re-registered investments onto the platform for an accurate view of gains/losses.