

**Investment Income Information**

**Individual Tax Return 2018**

Please e-mail, fax or post this form back to our officeto your appointment:

**TO:** Success Accounting Group **E-MAIL:** grow@successaccountinggroup.com.au

 **PHONE: Springvale** (03) 8511 4047 / **Mentone** (03) 9583 0550

 **FAX:** (03) 8511 4047

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| **CLIENT NAME:** |  | **CLIENT SIGNATURE:** |  |

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|  **DIVIDENDS** |
| **Company Name** | **Date Paid** | **Unfranked** | **Franked** | **Imputation****Credits** | **TFN Credits** |
|  |  | **$** | **$** | **$** | **$** |
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| **UNIT TRUSTS** |
| **Trust Name** | **Trust Income** | **TFN****Credits** | **Imputation****Credits** | **Capital****Gains** | **Foreign****Income** | **Foreign****Tax** |
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| **INVESTMENTS SOLD / DISPOSED** |
| **Company/Trust Name** | **Date****Sold** | **Number****Sold** | **Amount****Received** | **Date****Purchased** | **Number****Purchased** | **Amount****Paid** |
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