

**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](mailto:lan@successaccountingggroup.com.au)

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

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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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