Investment Income Information

Individual Tax Return 20__ (Enter year)

EUSTICE & CO ACCOUNTANTS
BUILD YOUR BUSINESS & GROW YOUR WEALTH

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

TO: Eustice & Co Accountants

FAX: Mentone (03) 9583 8534
Mornington (03) 5975 4601

ATTENTION:

E-MAIL: mentone@lreustice.com.au
mornington@lreustice.com.au

CLIENT NAME:		CLIENT SIGNATURE:	X

DIVIDENDS

Company Name	Date Paid	Unfranked	Franked	Imputation Credits	TFN Credits
		$	$	$	$
		$	$	$	$
		$	$	$	$
		$	$	$	$
		$	$	$	$
		$	$	$	$
		$	$	$	$
		$	$	$	$
		$	$	$	$
		$	$	$	$
		$	$	$	$
		$	$	$	$

UNIT TRUSTS

(Please bring or send to our office your Trust Tax Year Summary)

Trust Name	Trust Income	TFN Credits	Imputation Credits	Capital Gains	Foreign Income	Foreign Tax
	$	$	$	$	$	$
	$	$	$	$	$	$
	$	$	$	$	$	$
	$	$	$	$	$	$
	$	$	$	$	$	$

INVESTMENTS SOLD / DISPOSED

Company/Trust Name	Date Sold	Number Sold	Amount Received	Date Purchased	Number Purchased	Amount Paid
			$			$
			$			$
			$			$
			$			$
			$			$
			$			$
			$			$
			$			$
			$			$
			$			$