

Investment Information

Please e-mail this form back to our office once completed:

TO: IGnite Accounting
 E-MAIL: ignite@practicemanagerfiles.com

CLIENT NAME:		CLIENT SIGNATURE:	N/A
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DIVIDENDS – 1 July to 30 June

Company Name	Date Paid	Unfranked	Franked	Imputation Credits	TFN Credits
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UNIT TRUSTS – 1 July to 30 June (Please bring or send to our office your Trust Tax Year Summary-You may not receive this until September)

Trust Name	Trust Income	TFN Credits	Imputation Credits	Capital Gains	Foreign Income	Foreign Tax
	\$	\$	\$	\$	\$	\$
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INVESTMENTS SOLD / DISPOSED – 1 July to 30 June

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