Specialised Business Solutions
Solving real-world challenges for real people.

Investment Information

2018 Individual Tax Return

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

TO:	Specialised Business Solutions	**FAX:**	(07) 3221 4130
ATTENTION:		**E-MAIL:**	sbs@sbs.net.au

CLIENT NAME:		**CLIENT SIGNATURE:**	

DIVIDENDS – 1 July 2017 to 30 June 2018

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

UNIT TRUSTS – 1 July 2017 to 30 June 2018
(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 – 1 July 2017 to 30 June 2018

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

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