2018 Individual Tax Return

Investment Information

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

CLIENT NAME: _____

TO: 360 Financial Advantage Pty Ltd ACCOUNTANT: _____

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 email or post 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
	$	$	$	$	$	$
	$	$	$	$	$	$
	$	$	$	$	$	$
	$	$	$	$	$	$
	$	$	$	$	$	$
	$	$	$	$	$	$

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
			$			$
			$			$
			$			$
			$			$
			$			$

CLIENT SIGNATURE: _____ DATE: _____