



INDIVIDUAL INCOME TAX RETURN INVESTMENT PROPERTY INFORMATION FORM

Please email or post this form back to our office PRIOR to your appointment:

TO: The Garis Group **EMAIL:** reception@garis.com.au **POST:** PO Box 72, Hamilton NSW 2303

CLIENT NAME:	CLIENT SIGNATURE:
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DIVIDENDS – 1 July 2018 to 30 June 2019

Company Name	Date Paid	Unfranked	Franked	Imputation Credits	TFN Credits
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UNIT TRUSTS – 1 July 2018 to 30 June 2019 (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
	\$	\$	\$	\$	\$	\$
	\$	\$	\$	\$	\$	\$
	\$	\$	\$	\$	\$	\$
	\$	\$	\$	\$	\$	\$
	\$	\$	\$	\$	\$	\$

INVESTMENTS SOLD / DISPOSED – 1 July 2018 to 30 June 2019

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