

INVESTMENT INFORMATION



2019 Individual Tax Return

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

TO: HHH Partners
ATTENTION: _____

FAX: (07) 4983 9909
EMAIL: processing@hhhpartners.com.au

CLIENT NAME: _____ CLIENT SIGNATURE: **X** _____

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)

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
			\$			\$
			\$			\$
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