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

Investment Information

2023 **Individual Tax Return**

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

TO: Specialised Business Solutions
ATTENTION:
POST: GPO BOX 136, BRISBANE QLD 4001
E-MAIL: sbs@sbs.net.au

CLIENT NAME:		**CLIENT SIGNATURE:**	

DIVIDENDS – 1 July 2022 **to 30 June** 2023

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

UNIT TRUSTS – 1 July 2022 **to 30 June** 2023
(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 2022 **to 30 June** 2023

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

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