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

Investment Information

2024 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 2023 to 30 June 2024

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

UNIT TRUSTS – 1 July 2023 to 30 June 2024
(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 2023 to 30 June 2024

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

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