

TAX RETURN

Sale of Equity Investments

Please complete one form for each equity investment sale.

GENERAL TAX INFORMATION

NAME

D.O.B.

TFN

EQUITY INVESTMENT SALE RECORD

SHARE CODE	DATE PURCHASED	NUMBER PURCHASED	TOTAL COST	DATE SOLD	NUMBER SOLD	NET PROCEEDS	UNDER DRP*

Where equity investments have been held under Dividend Reinvestment Plans (DRP), you will need provide a history of dividends that were converted to shares. We can provide a number of options available if you have misplaced information over a number of years.

OTHER INFORMATION *Please list any other information that you believe may assist us*

SUPPORTING DOCUMENT CHECKLIST

- Shares / Equity Buy Notes
- Shares / Equity Sell Notes
- Evidence of DRPs - usually via dividend statements