

**Year:** 2019

Your name: \_\_\_\_\_

Broker: \_\_\_\_\_

Broker tel #: \_\_\_\_\_

**Preferably obtain an annual buy/sell, gain/loss statement from your broker. This will save on accounting fees.**

OR

Fill in below:

Sales of securities in 2019						
Company	Year of purchase	Date Sold	Number of shares	Sales price per unit	Outlays and expenses	Proceeds of sale

Purchases of above securities					
Company	Date	Number of shares	Purchase price per unit	Commissions and other expenses	Total cost of investment

Tell us about any complications: additional share purchase, capital gains exemption, return of capital, share swap, rights issues, capital dividends, return of investment, investment loans.

Please ensure we have permission to speak with your broker? Please provide the broker's name and phone # above.