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Taxation and Accounting Services

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Share Trading Worksheet

(Please record all Purchases and Sales of Shares as per settlement summaries
**** Note ** if you sold shares the during the year please provide the original purchase settlement details **)**
(Please advise of any prior years Capital Losses which can be offset against current year Capital Gains)

Client Name: ____

Tax File Number: ____________________

Company Name	**Date Sold**	**Number Sold**	**Total Sale Price $** (A)	**Date Purchase**	**Number Purchased**	**Total Purchase Price $** (B)	**Profit (Loss) on Sale $** (A minus B)

**** If accounts are held in joint names please split amounts ****