

TAXPAYER _____

YEAR _____

INVESTMENT QUESTIONNAIRE

INTEREST RECEIVED (BRING IN STATEMENTS)

FROM	FROM

DIVIDENDS RECEIVED (BRING IN STATEMENTS)

FROM	TOTAL DISTRIBUTION	PORTION OF TOTAL DISTRIBUTION WHICH IS			
		ORDINARY DIVIDEND	CAPITAL GAIN DISTRIBUTION	NON-TAXABLE	OTHER

CAPITAL GAINS AND LOSSES

NAME	NUMBER OF SHARES	ACQUIRED		SOLD	
		DATE	AMOUNT	DATE	AMOUNT

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