Taxpayer _____ For Year Ended _____

Investment Questionnaire

Interest Received (bring in statements)

FORM IQ-0505

From			From		
	$			$	

Dividends Received (bring in statements)

Dividend Payer Company	Total Ordinary Dividends	Qualified Dividends	Total Capital Gain Distr.		Nontaxable Distributions	Withholding	Foreign Tax
	$	$	$	$	$	$	$

Capital Gains or Losses

Name	Number of Shares	Date Acquired	Date Sold	Sales Price	Cost
				$	$

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