



What years were these stocks/mutual funds, etc. sold in? \_\_\_\_\_

Year stocks/mutual funds were sold for this schedule \_\_\_\_\_

**Schedule 1** **Note: If this is for the year 2000, please include the exact date of sale in the date column.**

Row #	Number of shares or units	Name of shares or units	Year Purchased	Price	Proceeds from sale	Outlays & Expenses	Date

Year stocks/mutual funds were sold for this schedule \_\_\_\_\_

**Schedule 2** **Note: If this is for the year 2000, please include the exact date of sale in the date column.**

Row #	Number of shares or units	Name of shares or units	Year Purchased	Price	Proceeds from sale	Outlays & Expenses	Date

Year stocks/mutual funds were sold for this schedule \_\_\_\_\_

**Schedule 3** **Note: If this is for the year 2000, please include the exact date of sale in the date column.**

Row #	Number of shares or units	Name of shares or units	Year Purchased	Price	Proceeds from sale	Outlays & Expenses	Date

Year stocks/mutual funds were sold for this schedule \_\_\_\_\_

**Schedule 4** **Note: If this is for the year 2000, please include the exact date of sale in the date column.**

Row #	Number of shares or units	Name of shares or units	Year Purchased	Price	Proceeds from sale	Outlays & Expenses	Date

Year stocks/mutual funds were sold for this schedule \_\_\_\_\_

**Schedule 5** **Note: If this is for the year 2000, please include the exact date of sale in the date column.**

Row #	Number of shares or units	Name of shares or units	Year Purchased	Price	Proceeds from sale	Outlays & Expenses	Date

Is there any information regarding your investments or expenses that you feel we should know, whether relevant to the above or not?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Electronic Signature \_\_\_\_\_

Date \_\_\_\_\_