

**SUPPLEMENTARY QUESTIONNAIRE**

**Test to see if your foreign equity investments cost less than \$50,000. Equity does not mean bank accounts and other interest bearing investments.**

Is the **cost** of your total foreign equity investments, at all times during the year, as an individual person, less than \$50,000? YES/NO

If YES - provide us with details of dividends in the usual way.

If NO – please continue to second test:  
Do you have any shares or other equity investments in overseas companies bought prior to 1 January 2000? YES/NO

If YES, what was the total **market value** of them at the beginning of your income year? \$ \_\_\_\_\_

Halve this amount and treat it as the cost of the equities. \$ \_\_\_\_\_

If Total A (see below), taking in the pre 2000 purchase at half, comes to less than \$50,000, supply us with details of dividends only.

***Table to help you add up the cost of all equity investments in foreign entities to see if you reach the \$50,000 threshold.***

Investment in foreign company shares	
Investment in foreign unit trusts	
Investment in foreign life insurance policies	
Investment in foreign superannuation or pension funds	
Investment in any other kind of foreign equity scheme	
<b>TOTAL cost of foreign equity investments (TOTAL A)</b>	