

## Creating Dividend Overview for Tax Returns

As part of a person's tax return they must show how many dividends they have received from the shares they hold. To quickly and simply get an overview of all the people involved in all of the companies and their dividends :

- Go to the top bar, **Select All > Dividends for all people**
- Enter a tax year (starting 6th April- 5th April of the following year)
- Click **View**
- A table will display a list of all the people involved in all of the companies on your Cosec System, with all of the dividends they have received over the last year.(as per dates that you enter when you start that process)
- The table can be exported, printed and turned into a spreadsheet.

To get a dividend overview for a particular person, showing all of the dividends they have received for all of their connected companies:

- **Person > Select Person**
- Select a person from the drop down menu bar
- **Select**
- **Person > Connected Companies**
- This page will display information about the companies that the person you have selected are connected to. If you scroll down to the bottom of the page the last table is named "DIVIDENDS FROM ALL COMPANIES PAID TO ...". Like all of the tables in the software, this can be exported and printed.