

Pre-filing report 2019

Report created: 03/03/2021



You should not rely exclusively on this report but use it to assist you in preparing your client's income tax return. For more information refer to www.ato.gov.au/taprefilling.

TAXPAYER DETAILS

| | |
|---|----------------------------------|
| Tax file number | 627461794 |
| Title | MRS |
| Given names | JULIE LYNNE |
| Family name and suffix | ORMSTON |
| Australian resident as at 03/03/2021 | Yes |
| Postal address | PO BOX 831 NEWCASTLE NSW 2300 |
| Residential address | 1 BUVELOT PL WOODVALE WA 6026 |
| Date of birth | 11/08/1960 |

2018-19 PAYG PAYMENT SUMMARIES as at 3 July 2019

Type of payment summary: INB payment summary (Original)

Available for pre-filing: 03/07/2019

ABN: 60660238660/1

Employer's name: WOODVALE GROUP PTY LTD ATF WOODVALE GROUP UNIT TRUST T/AS EVIEW GROUP JULIE (Type S)

Period from: 01/07/2018

Period to: 30/06/2019

| Description | Type | Tax withheld | Income | Label |
|--------------------|------|--------------|-------------|-------|
| Gross payments | | | \$79,999.00 | 1 |
| Total tax withheld | | \$25,792.00 | | 1 |

2018-19 INTEREST INCOME as at 9 July 2019

| Description | Gross | Apportioned | Label |
|---|---------|-------------|-------|
| TOTAL GROSS INTEREST | \$12.53 | \$6.26 | 10L |
| TOTAL TFN AMOUNTS WITHHELD FROM GROSS INTEREST | \$0.00 | \$0.00 | 10M |

Company: NATIONAL AUSTRALIA BANK LIMITED

Available for pre-filing: 09/07/2019

Account: 861854366

Name: HESFORD A

Investment owners: 2

| Description | Gross | Apportioned | Label |
|----------------|---------|-------------|-------|
| Gross interest | \$12.53 | \$6.26 | |

2018-19 MEDICARE LEVY SURCHARGE as at 15 July 2019

| Health | Health insurer name | Membership number | Start date | End date |
|--------|---------------------|-------------------|------------|----------|
|--------|---------------------|-------------------|------------|----------|

| | | | | |
|-------------------|--------------------|-----------|------------|------------|
| insurer ID | | | | |
| HBF | HBF HEALTH LIMITED | H05543847 | 01/07/2018 | 30/06/2019 |

2018-19 PRIVATE HEALTH INSURANCE POLICY DETAILS as at 15 July 2019

- From 1 July 2019, health insurers are no longer required to send a private health insurance statement to their clients, unless their client requests one. For more information, go to [Your Private Health Insurance Statement](#).

| Health insurer ID | Health insurer name | Membership number | Your premiums eligible for Australian Government rebate | Your Australian Government rebate received | Benefit code |
|-------------------|---------------------|-------------------|---|--|--------------|
| HBF | HBF HEALTH LIMITED | H05543847 | \$822.00 | | 36 |
| HBF | HBF HEALTH LIMITED | H05543847 | \$2,356.00 | | 35 |

2017-18 PRIOR YEAR TAX RETURN DETAILS as at 15 July 2019

- To view all labels completed in your client's prior year income tax return, refer to lodgment history.

| | |
|---------------------------------------|--------------|
| Occupation reported in 2017-18 | Label |
| DIRECTOR - MANAGING (Code: 111111) | 1X |

Sources of supplementary income reported in 2017-18

- Partnership and trust income

Rent reported in 2017-18

- 10 REDBUD TRAIL, EDGEWATER WA 6027.** The property first earned rental income from 07/08/2007.

| Deductions reported in 2017-18 | Type | Amount |
|--------------------------------|------|----------|
| Other work related expenses | | \$300.00 |

Dependent children reported in 2017-18

Number of dependent children and students for M1

Number of dependent children for IT8

Spouse details - married or de facto reported in 2017-18

Spouse's name FRANCIS ORMSTON
 Spouse's date of birth 02/04/1951
 Spouse's gender Male