

## Pre-filing report 2020

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/prefiling](http://www.ato.gov.au/prefiling).

### TAXPAYER DETAILS

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

### 2019-20 PAYG PAYMENT SUMMARIES as at 6 July 2020

**Type of payment summary:** INB payment summary

**Single Touch Payroll Status:** Finalised

**Available for pre-filing:** 06/07/2020

**ABN:** 60660238660/1

**Employer's name:** THE TRUSTEE FOR WOODVALE GROUP UNIT TRUST (Type S)

**Period from:** 01/07/2019

**Period to:** 30/06/2020

Description	Type	Tax withheld	Income	Label
Gross payments			\$144,615.00	1
Total tax withheld		\$50,992.00		1

### 2019-20 INTEREST INCOME as at 8 July 2020

Description	Gross	Apportioned	Label
<b>TOTAL GROSS INTEREST</b>	\$3.80	\$1.90	10L
<b>TOTAL TFN AMOUNTS WITHHELD FROM GROSS INTEREST</b>	\$0.00	\$0.00	10M

**Company name:** NATIONAL AUSTRALIA BANK LIMITED

**Available for pre-filing:** 08/07/2020

**Account number:** 861854366

**Account name:** HESFORD A

**Investment owners:** 2

Description	Gross	Apportioned
Gross interest	\$3.80	\$1.90

### 2019-20 MEDICARE LEVY SURCHARGE as at 9 July 2020

- The start and end date is the period your client had private patient hospital cover. In calculating the number of days covered you first need to check if all of their dependants, including their spouse, also had an appropriate level of private patient hospital cover for the income year. This information will then be used to determine your client's [Medicare levy surcharge](#) liability.

Health insurer ID	Health insurer name	Membership number	Start date	End date
HBF	HBF HEALTH LIMITED	H05543847	01/07/2019	30/06/2020

### 2019-20 PRIVATE HEALTH INSURANCE POLICY DETAILS as at 9 July 2020

- 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	\$2,467.00		35

### 2018-19 PRIOR YEAR TAX RETURN DETAILS as at 11 January 2021

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

Occupation reported in 2018-19	Label
DIRECTOR - MANAGING (Code: 111111)	1X

### Sources of supplementary income reported in 2018-19

- Partnership and trust income

### Rent reported in 2018-19

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

Deductions reported in 2018-19	Type	Amount
Other work related expenses		\$895.00

### Spouse details - married or de facto reported in 2018-19

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