

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	624249130
Title	MR
Given names	FRANCIS JOHN
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	02/04/1951

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 DIVIDEND INCOME as at 17 July 2019

Description	Gross	Apportioned	Label
TOTAL UNFRANKED DIVIDENDS	\$29.28	\$29.28	11S
TOTAL FRANKED DIVIDENDS	\$47.10	\$47.10	11T
TOTAL FRANKING CREDITS	\$20.18	\$20.18	11U

Company: AMP LIMITED

Available for pre-filing: 17/07/2019

SRN or HIN: *****922

Name: FRANCIS JOHN ORMSTON

Investment owners: 1

Description	Gross	Apportioned	Label
Unfranked dividends	\$29.28	\$29.28	
Franked dividends	\$47.10	\$47.10	
Franking credits	\$20.18	\$20.18	

2018-19 TAX OFFSETS

Detail	Amount	Label
Seniors and pensioners (includes self-funded retirees). Your client may be eligible.		T1

2018-19 MEDICARE LEVY SURCHARGE as at 15 July 2019

Health insurer ID	Health insurer name	Membership number	Start date	End date
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

2018-19 ATO DATA

Pay as you go (PAYG) instalments as at 24/05/2020: The total amount displayed represents the calculated liability, regardless of payment.

Quarter	Amount
Qtr 1	\$3,354.00
Qtr 2	\$3,354.00
Qtr 3	\$3,354.00
Qtr 4	\$3,354.00
Total	\$13,416.00

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
MANAGING DIRECTOR (Code: 111111)	1X

Sources of supplementary income reported in 2017-18

- Partnership and trust income

Deductions reported in 2017-18	Type	Amount
--------------------------------	------	--------

Other work related expenses

\$300.00

Dependent children reported in 2017-18Number 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 JULIE ORMSTON

Spouse's date of birth 11/08/1960

Spouse's gender Female