

Return	Date	Description
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BURGESNP3 14/11/2022

warning Return previously transmitted

warning Reportable fringe benefits is method of calculating the amount. PAYG  
summary no.

Rent Schedule testing...

RNTLPRPTY.W0warning Check (total) Repairs and maintenance expenses

*For a detailed explanation of the Error Messages, pull down the Help menu and select  
ELS V messages.*

**Taxation Estimate**  
For the year ended 30 June 2022

Return Code: BURGESNP3  
Client Code: BURGESNP3  
Name: NEVILLE PHILLIPS BURGES

Tax File Number  
621 708 908  
Date Prepared  
14th November 2022

DESCRIPTION	Debits \$	Credits \$
Your taxable income is \$57112		
<b>Tax on your taxable or net income</b>	<b>10,852.52</b>	
Less non-refundable tax offsets		2,643.32
<b>Assessed tax payable</b>	<b>8,209.20</b>	
<b>Plus other liabilities</b>		
Medicare Levy	1,142.24	
<b>PAYG credits and other entitlements</b>		<b>12,984.00</b>
<b>Result of this Estimate - Tax Refundable</b>		<b>3,632.56</b>

Estimate of PAYG income tax payable for the year ending 30 June 2023 9,774.00

**Primary Production Averaging Details**

No. of average years: 5  
Averaging

Taxable income 2018:	104032.00
Taxable income 2019:	85030.00
Taxable income 2020:	86307.00
Taxable income 2021:	63923.00
Taxable income 2022:	57112.00
Total:	396404.00
Average Income:	79280

Taxable income excludes Capital Gains

Tax on taxable income at standard rates:	9028.40
Less: Tax on taxable income at average rates:	11693.98
Basic complementary tax:	1824.12
Taxable primary production income:	39083.00
Other income subject to averaging	0.00
Complementary Tax:	1824.12

**Tax on taxable or net income \$10,852.52**

Income at Normal Rates	9,028.40
Complementary tax	1,824.12

**Total tax on taxable or net income 10,852.52**

Please note that this is our estimate of your assessment which may be subject to Tax Office adjustment for HECS-HELP, spouse's FTB overpayment or exceeding your concessional or non-concessional superannuation contributions cap in 2020 or 2021 (if applicable). A Notice of Assessment from the Australian Taxation Office will be forwarded to you at a later date.

**Taxation Estimate**  
For the year ended 30 June 2022

Return Code: BURGESP3  
Name: NEVILLE PHILLIPS BURGES

Tax File Number  
621 708 908

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**Non-refundable Tax Offsets Calculated \$2,643.32**

Low income offset	143.32
Low and middle income offset	1,500.00
Net small business tax offset	1,000.00

**PAYG Credits and other entitlements included \$12,984.00**

Pay as you go (PAYG) instalments (as notified in your activity statements)	12,984.00
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**Taxation Estimate**  
For the year ended 30 June 2022

Return Code: BURGESP3  
Name: NEVILLE PHILLIPS BURGES

Tax File Number  
621 708 908

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**Estimate of PAYG income tax payable**

Amount of notional tax adjusted for GDP 9,774.00

Subject to variation in income, amounts payable should be as follows:

28 April, 2023	7,330
28 July, 2023	2,444

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9,774

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# Individual tax return 2022

01/07/2021 to 30/06/2022

**Your tax file number**

621 708 908

See the Privacy note in the Taxpayer's declaration

Are you an Australian resident?

 Y

Have you included any attachments?

 N**Your name**Title  
Surname or family name  
Given names

MR

BURGES

NEVILLE PHILLIPS

Has any part of your name changed since last tax return lodged?

 N**Your postal address**Street  
Suburb/State/P'code

CARTER WOODGATE

PO BOX 1156

MIDLAND

WA

6936

**Your home address**Street  
Suburb/State/P'code

TRALEE FARM

GOOMALLING ROAD

MECKERING

WA

6405

**Your daytime phone no.**

08

92502144

**Your date of birth**

01/11/1957

Final tax return

 N**Electronic funds transfer (EFT)**BSB no  
Account name

736107

Account no

540682

N P BURGES

Return code

BURGESNP3

THIS COPY MAY NOT BE LODGED WITH THE ATO.

**Sensitive** (when completed)

Income

10 Gross interest

L 1036

I Transfer the amount from TOTAL SUPPLEMENT INCOME OR LOSS

82626

TOTAL INCOME OR LOSS

Add up items 1 to 12 and I

83662

Deductions

D Transfer the amount from TOTAL SUPPLEMENT DEDUCTIONS

26550

TOTAL DEDUCTIONS

Add up items D1 to D10 and D

26550

SUBTOTAL

TOTAL INCOME/LOSS less  
TOTAL DEDUCTIONS

57112

TAXABLE INCOME  
OR LOSS

Subtract item L1 from SUBTOTAL

\$ 57112

Tax offsets

TOTAL TAX OFFSETS

Items T2 and T

U 0

Medicare levy related items

M2 Medicare levy surcharge

For the whole period 1 July 2021 to 30 June 2022 were you  
and all your dependants (including your spouse)-if you had any-  
covered by private patient HOSPITAL cover?

E Y

Number of days NOT liable for surcharge

A 365

Private health insurance policy details - no. 1

TaxPayer

Period 1 - 01/07/2021 to 31/03/2022

Health insurer ID B HBF

Membership number C P18893601

Your premiums eligible  
for Australian Govt. rebate J 3349

Australian Government  
rebate received K 824

Benefit code L 30

Tax claim code A

Period 2 - 01/04/2022 to 30/06/2022

Health insurer ID B HBF

Membership number C P18893601

Your premiums eligible  
for Australian Govt. rebate J 0

Australian Government  
rebate received K 0

Benefit code L 31

Tax claim code A

Sensitive (when completed)

Private health insurance policy details - no. 2

TaxPayer

Period 1 - 01/07/2021 to 31/03/2022

Health insurer ID	<b>B</b> HBF	Membership number	<b>C</b> P18893601
Your premiums eligible for Australian Govt. rebate	<b>J</b> 1116	Australian Government rebate received	<b>K</b> 320
Benefit code	<b>L</b> 35	Tax claim code	<b>A</b>

Period 2 - 01/04/2022 to 30/06/2022

Health insurer ID	<b>B</b> HBF	Membership number	<b>C</b> P18893601
Your premiums eligible for Australian Govt. rebate	<b>J</b> 0	Australian Government rebate received	<b>K</b> 0
Benefit code	<b>L</b> 36	Tax claim code	<b>A</b>

Income tests

IT1 Total reportable fringe benefits amounts

Employers exempt from FBT under sect. 57A of the FBTA 1986 **N**

Employers not exempt from FBT under sect. 57A of the FBTA 1986 **W**

IT2 Reportable employer superannuation contributions **T**

IT3 Tax-free government pensions **U**

IT4 Target foreign income **V**

IT5 Net financial investment loss **X**

IT6 Net rental property loss **Y**

IT7 Child support you paid **Z**

IT8 Number of dependent children **D**

Sensitive (when completed)

**SUPPLEMENTARY SECTION**

**Income**

**13 Partnerships and trusts**

**Primary production**

Distribution from partnerships **N**  /

Net primary production amount  /

**Non-primary production**

Distribution from partnerships less foreign income **O**  /

Net non-primary production amount  /

Partnership share of net small business income less deductions attributable to that share **D**

Trust share of net small business income less deductions attributable to that share **E**

**18 Capital gains**

Did you have a CGT event during the year? **G**

Have you applied an exemption or rollover? **M**  /

**19 Foreign entities**

Did you have either a direct or indirect interest in a controlled foreign company (CFC)? **I**

Have you ever, either directly or indirectly, caused the transfer of property (incl. money) or services to a non-resident trust estate? **W**

**20 Foreign source income and foreign assets or property**

Other net foreign source income **M**  /

Did you own, or have an interest in, assets located outside Australia during the year which had a total value of AUD \$50,000 or more? **P**

**Sensitive** (when completed)



**21 Rent**

Gross rent **P**

Interest deductions **Q**

Other rental deductions **U**

Net rent (P-Q-F-U)  **L**

**TOTAL SUPPLEMENTARY SECTION INCOME OR LOSS**   
- items 13 to 24 transfer to I

**Deductions**

**D12 Personal superannuation contributions** **H**

Did you provide your fund (including a retirement savings account) with a notice of intent to claim a deduction for personal superannuation contributions, and receive an acknowledgement from your fund?

Fund name	NP & JM Burges Super Fund	
Fund ABN	27 889 972 160	
Fund TFN	99 532 583	
Account number	501	

**TOTAL SUPPLEMENTARY SECTION DEDUCTIONS**   
items D11 to D15 transfer to D

**Taxpayer's declaration**

Read and sign the declaration after completing your tax return, including the Supplementary section, Business and professional items section and other schedules if applicable.

**I declare that**

- \* the information provided to my registered agent for the preparation of this tax return is true and correct, and
- \* I authorise my registered tax agent to lodge this tax return.

Taxpayer's Signature  Date

**Important:** The tax law imposes heavy penalties for giving false or misleading information.

The ATO will issue your assessment based on your tax return. However, the ATO has some time to review your tax return, and issue an amended assessment if a review shows inaccuracies that change the assessment. The standard review period is two years but for some taxpayers it is four years.

**Privacy:**

The ATO is authorised by the *Taxation Administration Act 1953* to request your tax file number (TFN). We will use your TFN to identify you in our records. It is not an offence not to provide your TFN. However if you do not provide your TFN, your assessment may be delayed. Taxation law authorises the ATO to collect information and to disclose it to other government agencies. For information about your privacy go to [ato.gov.au/privacy](http://ato.gov.au/privacy)

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**Tax agent's declaration:** We, CARTER WOODGATE PTY LTD,  
declare that this tax return has been prepared in accordance with information supplied by the taxpayer, and that the taxpayer has given me a declaration stating that the information provided to me is true and correct and that the taxpayer has authorised me to lodge the tax return.

Agent's signature	<input type="text"/>	Date	<input type="text"/>
Agent's telephone	<input type="text" value="08 9250 2144"/>	Client's reference	<input type="text" value="BURGESNP3"/>
Contact name	<input type="text" value="LINDSAY RAYMOND CARTER"/>	Agent's reference no	<input type="text" value="64104000"/>

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**NOTE: THIS PRINT-OUT IS NOT TO BE LODGED WITH THE ATO.**

**Address of property**

Suburb/State/P'code	252 ARMADALE ROAD		
	KEWDALE	WA	6105

Date property first earned rental income			01/07/2008
Rented from	01/07/2021	to	30/06/2022
Ownership %			100.00
Number of weeks property was rented this year			52

**Income**

	Gross amount		Your Share
Rents received	13520.00	<b>A</b>	13520.00
Gross rent:	13520.00	<b>C</b>	13520.00

**Expenses**

	Gross amount		Your share
Council rates	1554.00	<b>H</b>	1554.00
Depreciation on plant			
Amount from depreciation worksheet	149		
	149.00	<b>I</b>	149.00
Interest on loan(s)	1953.00	<b>L</b>	1953.00
Repairs and maint.	10509.00	<b>Q</b>	10509.00
Water charges	1984.00	<b>U</b>	1984.00
Total expenses	16149.00	<b>W</b>	16149.00
Net rent: Take W away from C	2629.00	<b>X</b>	2629.00

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**D12 Personal superannuation contributions**

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Did you provide your fund (including a retirement savings accounts) with a notice of intent to claim a deduction for personal superannuation contributions, and receive an acknowledgement from your fund?

Y

Fund name	NP & JM Burges Super Fund
Fund ABN	27 889 972 160
Fund TFN	99 532 583
Account number	501
Deduction claimed	26550.00

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**Interest Income**

<b>Financial institution</b>	<b>Gross TFN Withholding</b>	<b>Your Share TFN Withholding</b>	<b>Gross Interest</b>	<b>Your Share Interest</b>
MACQUARIE BANK LIMITED Account number: 122001597 Number of account holders: 1			0.35	0.35
WESTPAC SAVINGS AC Account number: 257003 Number of account holders: 1			135.89	135.89
RABO BANK - FMD Number of account holders: 1			900.00	900.00

Subtotal	0.00	0.00	1036.24	1036.24
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Your share interest total

**Dividend Income**

<b>Company</b>	<b>Gross Amount</b>	<b>Your Share</b>
Ref Number:	Unfranked dividends	
Number of account holders:	Franked dividends	
Country of residence: AUSTRALIA	Franking credits	
	TFN withholding	

**Totals - Your Share**

Unfranked dividends	Franked dividends	Franking credits	TFN withholding	Exploration credits	Listed inv. company cap gain deduction

**Financial investment income and deductions worksheet**

**Net financial investment income/loss**   
 (a Loss amount will be Integrated to item IT5 label X)

**Tax offsets and Medicare**

T **Total tax offsets included in tax return** **Tax Offset**  
0

**M2 Medicare levy surcharge**

Days exempt from Medicare:		
Days under MLS Threshold:		
Days in Fund:		365
Add: Days otherwise not liable:		
Less: Days exemptions overlap or are otherwise n/a:		
Number of days not liable for Surcharge:		365

**Surcharge:**

**Distributions received from Partnerships**

Partnership Name	NP BURGES & RP BURGES & TRALEE		
TFN	927 151 123	ABN	
Share of PP income	39083	Tax credit - no ABN	
Share of NPP income	46172	Franking credit	
Franked distributions		Tax credit - TFN	
Share of NRAS		Cr for TFN w/held	
FRW (excl. CGT)		closely held trusts	
Share of net small business income	85241	Share of Exploration credits	
ESVCLP tax offset		ESIC tax offset	
Share of Cr. FRW capital gains			

Less: Deductions relating to Landcare operations and water conservation expenses

	PP	NPP
MANAGEMENT FEES AND INTEREST		
<b>Total</b>		
<b>Total deductions</b>		
<b>Net distribution</b>	39083	46172

FMD Provider RABO BANK

Deductible deposits		
Early repayments - natural disaster and drought		
Other repayments		
Net farm management deposits or repayments		

**Foreign Income Schedule**

**Other Deductions**

