



## Pre-filing report 2020

Report created: 05/01/2021

**!** 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).  
(<https://www.ato.gov.au/prefiling>)

### TAXPAYER DETAILS

<b>Tax file number</b>	482308842
<b>Title</b>	MR
<b>Given names</b>	CRAIG ANTHONY
<b>Family name and suffix</b>	ROSS
<b>Australian resident as at 05/01/2021</b>	Yes
<b>Postal address</b>	P O BOX 24 CLEVELAND QLD 4163
<b>Residential address</b>	3 STONELEIGH ST COORPAROO QLD 4151
<b>Date of birth</b>	02/03/1956

### 2019-20 PAYG PAYMENT SUMMARIES as at 7 July 2020

<b>Type of payment summary:</b>	INB payment summary	SGC @ 9.5% = \$16,227.90		
<b>Single Touch Payroll Status:</b>	Finalised	Plus Reportable Super contbs \$7,800		
<b>Available for pre-filing:</b>	07/07/2020	Total Employer Contbns \$24,027.90		
<b>ABN:</b>	16010986240/1	Super contbns per accounts \$24,766.30		
<b>Employer's name:</b>	HAWKINS JENKINS ROSS PTY. LTD. (Type S)	Variance represents a timing difference for June contbns		
<b>Period from:</b>	01/07/2019			
<b>Period to:</b>	30/06/2020			
<b>Description</b>	<b>Type</b>	<b>Tax withheld</b>	<b>Income</b>	<b>Label</b>
Gross payments			\$170,820.00	1
Total tax withheld		\$54,184.00		1
Reportable fringe benefits			\$4,526.00	IT1W
Is the employer exempt from FBT under section 57A of the FBTAA 1986?	No			
Reportable employer superannuation contributions			\$7,800.00	IT2

**2019-20 INTEREST INCOME as at 7 July 2020**

Description	Gross	Apportioned	Label
<b>TOTAL GROSS INTEREST</b>	\$6,051.29	\$5,883.61	10L
<b>TOTAL TFN AMOUNTS WITHHELD FROM GROSS INTEREST</b>	\$0.00	\$0.00	10M

<b>Company name:</b>	ANZ BANKING GROUP LTD		
<b>Available for pre-filing:</b>	07/07/2020		
<b>Account number:</b>	000000252390324		
<b>Account name:</b>	THE ROSS SUPER FUND		
<b>Investment owners:</b>	2		
<b>Description</b>	<b>Gross</b>	<b>Apportioned</b>	
Gross interest	\$312.03	\$156.02	

<b>Company name:</b>	ANZ BANKING GROUP LTD		
<b>Available for pre-filing:</b>	07/07/2020		
<b>Account number:</b>	000000478425876		
<b>Account name:</b>	ROSS CA/GC		
<b>Investment owners:</b>	2		
<b>Description</b>	<b>Gross</b>	<b>Apportioned</b>	
Gross interest	\$23.33	\$11.66	

<b>Company name:</b>	ANZ BANKING GROUP LTD		
<b>Available for pre-filing:</b>	07/07/2020		
<b>Account number:</b>	000000591541107		
<b>Account name:</b>	ROSS C A		
<b>Investment owners:</b>	1		
<b>Description</b>	<b>Gross</b>	<b>Apportioned</b>	
Gross interest	\$1,043.17	\$1,043.17	

<b>Company name:</b>	ANZ BANKING GROUP LTD		
<b>Available for pre-filing:</b>	07/07/2020		
<b>Account number:</b>	000000919915986		
<b>Account name:</b>	ROSS C A		
<b>Investment owners:</b>	1		
<b>Description</b>	<b>Gross</b>	<b>Apportioned</b>	
Gross interest	\$4,672.76	\$4,672.76	

**2019-20 MEDICARE LEVY SURCHARGE as at 6 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 \(https://www.ato.gov.au/prefillMLS\)](https://www.ato.gov.au/prefillMLS) liability.

Health insurer ID	Health insurer name	Membership number	Start date	End date
BUP	BUPA	52992302	01/07/2019	30/06/2020

### 2019-20 PRIVATE HEALTH INSURANCE POLICY DETAILS as at 6 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. \(https://www.ato.gov.au/prefillPHIS\)](https://www.ato.gov.au/prefillPHIS)

Health insurer ID	Health insurer name	Membership number	Your premiums eligible for Australian Government rebate	Your Australian Government rebate received	Benefit code
BUP	BUPA	52992302	\$661.00		31
BUP	BUPA	52992302	\$1,983.00		30

### 2019-20 INCOME TEST RELATED ITEMS

Description	Amount	Label
<b>Total reportable fringe benefits amount</b>	\$4,526.00	IT1
<b>Reportable employer superannuation contributions</b>	\$7,800.00	IT2
<ul style="list-style-type: none"> <li>Ensure compulsory super amounts are not included</li> </ul>		

### 2019-20 ATO DATA

**Pay as you go (PAYG) instalments** as at 09/08/2020: The total amount displayed represents the calculated liability, regardless of payment.

Quarter	Amount
Qtr 1	\$2,915.00
Qtr 2	\$2,915.00
Qtr 3	\$2,915.00
Qtr 4	\$2,915.00
<b>Total</b>	<b>\$11,660.00</b>

### 2018-19 PRIOR YEAR TAX RETURN DETAILS as at 17 June 2020

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

<b>Occupation reported in 2018-19</b>	<b>Label</b>
MECHANICAL ENGINEER (Code: 233512)	1X

#### Rent reported in 2018-19

- **21 GARDEN STREET, GREENSLOPES QLD 4120.** The property first earned rental income from 03/10/2005.
- **11 GARDEN STREET, GREENSLOPES QLD 4120.** The property first earned rental income from 15/07/2006.

<b>Capital gains reported in 2018-19</b>	<b>Amount</b>	<b>Label</b>
Net capital losses carried forward to later income years	\$1,284.00	18V

<b>Deductions reported in 2018-19</b>	<b>Type</b>	<b>Amount</b>
Dividend deductions		\$13,774.00
Cost of managing tax affairs: other expenses incurred in managing your tax affairs		\$1,694.00

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

Spouse's name	GERALDINE CHARMAINE ROSS
Spouse's date of birth	22/06/1956
Spouse's gender	Female