



79,999 x 9.5%  
= 7,599.91

Fund Rec = 7,599.80

## Pre-filing report 2021

Report created: 14/09/2021

**i** 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>	380892104
<b>Title</b>	MR
<b>Given names</b>	LEVI SIMON
<b>Family name and suffix</b>	VAN DIJK
<b>Australian resident as at 14/09/2021</b>	Yes
<b>Postal address</b>	P O BOX 24 CLEVELAND QLD 4163
<b>Residential address</b>	16 HELENA ST WELLINGTON POINT QLD 4160
<b>Date of birth</b>	25/04/1980

### 2020-21 PAYG PAYMENT SUMMARIES as at 23 August 2021

<b>Type of payment summary:</b>	INB payment summary			
<b>Single Touch Payroll Status:</b>	Finalised			
<b>Available for pre-filing:</b>	05/07/2021			
<b>ABN:</b>	49132247486/1			
<b>Employer's name:</b>	TIDE PROPERTIES PTY LTD (Type S)			
<b>Period from:</b>	01/07/2020			
<b>Period to:</b>	30/06/2021			
<b>Description</b>	<b>Type</b>	<b>Tax withheld</b>	<b>Income</b>	<b>Label</b>
Gross payments			\$79,999.00	1
Total tax withheld		\$18,453.00		1

<b>Type of payment summary:</b>	Superannuation lump sum payment summary (Original)			
<b>Available for pre-filing:</b>	23/08/2021			
<b>ABN:</b>	76746741299/1			
<b>Payer's name:</b>	NATIONAL MUTUAL RETIREMENT FUND			
<b>Date of payment:</b>	19/08/2020			
<b>Description</b>	<b>Type</b>	<b>Tax withheld</b>	<b>Income</b>	<b>Label</b>

Total tax withheld	\$1,268.00	8
Taxable component - taxed element	\$7,459.00	8Q
Tax free component	\$4,878.00	
Death benefit	Yes	
Type of death benefit	N	8

### 2020-21 MEDICARE LEVY SURCHARGE as at 2 July 2021

- 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
MBP	MEDIBANK PRIVATE LIMITED	31312254	01/07/2020	30/06/2021

### 2020-21 PRIVATE HEALTH INSURANCE POLICY DETAILS as at 2 July 2021

- 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
MBP	MEDIBANK PRIVATE LIMITED	31312254	\$598.00	\$147.00	31
MBP	MEDIBANK PRIVATE LIMITED	31312254	\$1,662.00	\$416.00	30

### 2020-21 ATO DATA

**Pay as you go (PAYG) instalments** as at 27/06/2021: The total amount displayed represents the calculated liability, regardless of payment.

Quarter	Amount
Qtr 1	\$2,398.00
Qtr 2	\$1,559.00
Qtr 3	\$1,979.00
Qtr 4	\$1,979.00
<b>Total</b>	<b>\$7,915.00</b>

## 2019-20 PRIOR YEAR TAX RETURN DETAILS as at 16 June 2021

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

Occupation reported in 2019-20	Label
REAL ESTATE AGENT (Code: 612114)	1X

### Sources of supplementary income reported in 2019-20

- Partnership and trust income

Deductions reported in 2019-20	Type	Amount
<b>Work-related expenses</b>		
Your client's total work-related expenses for 2019-20 were high compared to those in the same occupation with similar income. We recognise that larger claims can be legitimate, however we may review deductions if they remain high in 2020-21. In preparing this year's return please ensure:		
<ul style="list-style-type: none"> <li>your client spent the money and was not reimbursed</li> <li>it is directly related to earning their income</li> <li>they have a record to prove it.</li> </ul>		
Work related car expenses	Claim type B	\$11,990.00
Work related travel expenses		\$8.00
Work related uniform expenses	Claim type S	\$53.00
Other work related expenses		\$1,288.00
Gifts or donations		\$922.00

### Dependent children reported in 2019-20

Number of dependent children and students for M1	2
Number of dependent children for IT8	2

### Spouse details - married or de facto reported in 2019-20

Spouse's name	ANNA LOUISE VAN DIJK
Spouse's date of birth	13/09/1984