



Australian Government
Australian Taxation Office

Pre-filing report 2022

Report created: 03/04/2023

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

TAXPAYER DETAILS

| | |
|---|-----------------------------------|
| Tax file number | 565906497 |
| Title | MR |
| Given names | MICHAEL WARRICK |
| Family name and suffix | RUSS |
| Australian resident as at 03/04/2023 | Yes |
| Postal address | PO BOX 230 GLEN OSMOND SA 5064 |
| Residential address | 3 THE PARADE MARION SA 5043 |
| Date of birth | 15/01/1955 |

2021-22 PAYG PAYMENT SUMMARIES as at 7 July 2022

| | | | | |
|-------------------------------------|--|---------------------|---------------|--------------|
| Type of payment summary: | INB payment summary | | | |
| Single Touch Payroll Status: | Finalised | | | |
| Available for pre-filing: | 07/07/2022 | | | |
| ABN: | 81006722292/1 | | | |
| Employer's name: | LEGEND CORPORATE SERVICES PTY LIMITED (Type S) | | | |
| Period from: | 01/07/2021 | | | |
| Period to: | 30/06/2022 | | | |
| Description | Type | Tax withheld | Income | Label |
| Gross payments | | | \$56,333.00 | 1 |
| Total tax withheld | | \$10,149.00 | | 1 |

2021-22 INTEREST INCOME as at 13 July 2022

| Description | Gross | Apportioned | Label |
|---|---------|-------------|-------|
| TOTAL GROSS INTEREST | \$54.87 | \$27.44 | 10L |
| TOTAL TFN AMOUNTS WITHHELD FROM GROSS INTEREST | \$0.00 | \$0.00 | 10M |

| | | | |
|----------------------------------|-------------------------------------|--------------------|----------------------------|
| Company name: | WESTPAC BANKING CORPORATION | | |
| Available for pre-filing: | 13/07/2022 | | |
| Account number: | 589302 | | |
| Account name: | MICHAEL W RUSS AND CAROL ALINE RUSS | | |
| Investment owners: | 2 | | |
| Description | Gross | Apportioned | Certainty Indicator |
| Gross interest | \$54.87 | \$27.44 | |

2021-22 TAX OFFSETS

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

2021-22 MEDICARE LEVY SURCHARGE as at 4 July 2022

- 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 | 7117401 | 01/07/2021 | 30/06/2022 |

2021-22 PRIVATE HEALTH INSURANCE POLICY DETAILS as at 4 July 2022

- 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 | 7117401 | \$2,929.00 | \$841.00 | 35 |

2020-21 PRIOR YEAR TAX RETURN DETAILS as at 15 June 2022

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

| Occupation reported in 2020-21 | Label |
|---|-------|
| ENGINEERING TECHNOLOGIST (Code: 233914) | 1X |

Rent reported in 2020-21

- 6 TUDOR AVENUE, VICTOR HARBOR SA 5211.** The property first earned rental income from 27/10/2020.

| Capital gains reported in 2020-21 | Amount | Label |
|--|---------------|--------------|
| Net capital losses carried forward to later income years | \$453.00 | 18V |

| Deductions reported in 2020-21 | Type | Amount |
|--|-------------|---------------|
| Other work related expenses | | \$674.00 |
| Cost of managing tax affairs: other expenses incurred in managing your tax affairs | | \$220.00 |

| Spouse details - married or de facto reported in 2020-21 | |
|---|------------------|
| Spouse's name | CAROL ALINE RUSS |
| Spouse's date of birth | 16/03/1958 |