

Pre-filing report 2020

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/prefilling.

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

2019-20 PAYG PAYMENT SUMMARIES as at 6 July 2020

Type of payment summary: INB payment summary

Single Touch Payroll Status: Finalised

Available for pre-filing: 06/07/2020

ABN: 60660238660/1

Employer's name: THE TRUSTEE FOR WOODVALE GROUP UNIT TRUST (Type S)

Period from: 01/07/2019

Period to: 30/06/2020

Description	Type	Tax withheld	Income	Label
Gross payments			\$79,999.00	1
Total tax withheld		\$25,792.00		1

2019-20 TAX OFFSETS

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

2019-20 MEDICARE LEVY SURCHARGE as at 9 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](#) liability.

Health insurer ID	Health insurer name	Membership number	Start date	End date
HBF	HBF HEALTH LIMITED	H05543847	01/07/2019	30/06/2020

2019-20 PRIVATE HEALTH INSURANCE POLICY DETAILS as at 9 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](#).

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	\$2,467.00		35

2018-19 PRIOR YEAR TAX RETURN DETAILS as at 11 January 2021

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

Occupation reported in 2018-19

DIRECTOR - MANAGING (Code: 111111)

Label

1X

Sources of supplementary income reported in 2018-19

- Partnership and trust income

Deductions reported in 2018-19

Other work related expenses

Type

Amount

\$850.00

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

Spouse's name	JULIE LYNNE ORMSTON
Spouse's date of birth	11/08/1960
Spouse's gender	Female