

Pre-filing report 2020

Report created: 23/02/2021



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.

TAXPAYER DETAILS

Tax file number	431558000
Title	MRS
Given names	ALICE ADEL
Family name and suffix	MCDONALD
Australian resident as at 23/02/2021	Yes
Postal address	PO BOX 831 NEWCASTLE NSW 2300
Residential address	33 ALBERT ST VALENTINE NSW 2280
Date of birth	07/02/1982

2019-20 PAYG PAYMENT SUMMARIES as at 5 July 2020

Type of payment summary: INB payment summary

Single Touch Payroll Status: Finalised

Available for pre-filing: 05/07/2020

ABN: 27645237701/1

Employer's name: NSW HEALTH SERVICE - HUNTER NEW ENGLAND LOCAL HEALTH DISTRICT (Type S)

Period from: 01/07/2019

Period to: 30/06/2020

Description	Type	Tax withheld	Income	Label
Gross payments			\$110,549.00	1
Total tax withheld		\$30,982.00		1
Allowances			\$329.00	2
Reportable fringe benefits			\$21,996.00	IT1N
Is the employer exempt from FBT under section 57A of the FBTA 1986?	Yes			
Reportable employer superannuation contributions			\$520.00	IT2

2019-20 INTEREST INCOME as at 8 July 2020

Description	Gross	Apportioned	Label
TOTAL GROSS INTEREST	\$41.91	\$20.96	10L
TOTAL TFN AMOUNTS WITHHELD FROM GROSS INTEREST	\$0.00	\$0.00	10M

Company name: NATIONAL AUSTRALIA BANK LIMITED

Available for pre-filing: 08/07/2020

Account number: 811930148

Account name: MCDONALD A

Investment owners: 2

Description	Gross	Apportioned
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Gross interest	\$41.91	\$20.96
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2019-20 DIVIDEND INCOME as at 9 July 2020

Description	Gross	Apportioned	Label
TOTAL FRANKED DIVIDENDS	\$327.04	\$327.04	11T
TOTAL FRANKING CREDITS	\$140.17	\$140.17	11U

Company name: NIB HOLDINGS LIMITED

Available for pre-filing: 09/07/2020

Investment reference number: *****937

Account name: MRS ALICE MCDONALD

Investment owners: 1

Description	Gross	Apportioned
Franked dividends	\$276.00	\$276.00
Franking credits	\$118.29	\$118.29

Company name: TELSTRA CORPORATION LIMITED

Available for pre-filing: 29/06/2020

Investment reference number: *****679

Account name: MRS ALICE ADEL MCDONALD

Investment owners: 1

Description	Gross	Apportioned
Franked dividends	\$51.04	\$51.04
Franking credits	\$21.88	\$21.88

2019-20 PROPERTY TRANSFER as at 21 February 2021

- Your client may have transferred properties resulting in a capital gains tax event. For more information go to <https://www.ato.gov.au/prefillCGT> for current information on your tax obligations. We are able to display a maximum of 5 transactions only.
- The sale price is for a disposal event which may be more than one property address.

Property address	Contract Date	Settlement Date	Sale Price
57 PARKLEA AVE , CROUDACE BAY NSW 2280	04/12/2019	17/01/2020	\$950,000.00

- Your client may not have a CGT obligation for the above property if they were resident for tax purposes at the time of disposal and it was their [main residence](#).

2019-20 MEDICARE LEVY SURCHARGE as at 8 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
NIB	NIB HEALTH FUNDS LTD	10875143	01/07/2019	20/09/2019
NTF	TEACHERS HEALTH FUND	889003	20/09/2019	30/06/2020

2019-20 PRIVATE HEALTH INSURANCE POLICY DETAILS as at 8 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
NIB	NIB HEALTH FUNDS LTD	10875143	\$555.00	\$139.00	30
NTF	TEACHERS HEALTH FUND	889003	\$619.00	\$104.00	31
NTF	TEACHERS HEALTH FUND	889003	\$1,319.00	\$220.00	30

2019-20 INCOME TEST RELATED ITEMS

Description	Amount	Label
Total reportable fringe benefits amount	\$21,996.00	IT1
Reportable employer superannuation contributions	\$520.00	IT2
<ul style="list-style-type: none"> Ensure compulsory super amounts are not included 		

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	\$1,052.00
Qtr 2	\$1,052.00
Qtr 3	\$1,052.00-
Qtr 4	\$0.00
Total	\$1,052.00

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.

Occupation reported in 2018-19	Label
RADIOGRAPHER (Code: 251211)	1X

Deductions reported in 2018-19	Type	Amount
Work related uniform expenses	Claim type C	\$290.00
Other work related expenses		\$335.00
Gifts or donations		\$383.00
Other deductions		\$1,594.00

Dependent children reported in 2018-19

Number of dependent children and students
for M1 2

Number of dependent children for IT8 2

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

Spouse's name ADAM MCDONALD

Spouse's date of birth 30/11/1981

Spouse's gender Male