

PART A Electronic Lodgment Declaration (Form I)

This declaration is to be completed where a taxpayer elects to use an approved ATO electronic channel. It is the responsibility of the taxpayer to retain this declaration for a period of five years after the declaration is made, penalties may apply for failure to do so.

Privacy

The ATO is authorised by the Taxation Administration Act 1953 to request your tax file number (TFN). We will use your TFN to identify you in our records. It is not an offence not to provide your TFN. However, you cannot lodge your income tax form electronically if you do not quote your TFN.

Taxation law authorises the ATO to collect information and to disclose it to other government agencies. For information about your privacy go to ato.gov.au/privacy

Electronic funds transfer - direct debit

Where you have requested an EFT direct debit some of your details will be provided to your financial institution and the Tax Office's sponsor bank to facilitate the payment of your taxation liability from your nominated account.

Tax file number	333 766 162	Year	2016
Name	Mrs Heather Lynette Sheppard		

Declaration

I declare that:

- the information provided to my registered tax agent for the preparation of this tax return, including any applicable schedules is true and correct, and
- the agent is authorised to lodge this tax return.

Important: The tax law imposes heavy penalties for giving false or misleading information.

Signature		Date	
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PART B Electronic funds transfer consent

This declaration is to be completed when an electronic funds transfer (EFT) of a refund is requested and the tax return is being lodged through an approved ATO electronic lodgment channel .

The declaration must be signed by the taxpayer prior to the EFT details being transmitted to the Tax Office. If you elect for an EFT, all details below must be completed.

Important: Care should be taken when completing EFT details as the payment of any refund will be made to the account specified.

Agent's reference number	
Account Name:	RJ & HL Sheppard

I authorise the refund to be deposited directly to the specified account as above.

Signature		Date	
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PART C Family Assistance Office consent

This declaration is to be completed where:

- you were the spouse of an Family Tax Benefit (FTB) claimant, or the spouse of a child care benefit claimant on 30 June of the year of this return - AND
- your spouse has given you authority to quote their customer reference number (CRN) on your tax return - if your spouse does not know their CRN they can contact the Family Assistance Office (FAO) - AND
- your spouse has a debt due to the FAO or expects to have a FAO debt for the year of this return - AND
- you expect to receive a tax refund for the year of this return - AND
- you consent to use part or all of your tax refund to repay your spouse's FAO debt.

Declaration of consent:

I consent to the Tax Office using part or all of my tax refund to repay any FAO debt of my spouse, whose details I have provided. I have obtained my spouse's permission to quote their CRN.

Tax file number:		Year:	
Name:			
Spouse's name:			
Spouse's CRN:		Spouse's date of birth:	
		Spouse's gender:	
Signature:		Date:	

Individual tax return

1 July 2015 to 30 June 2016

2016

Your tax file number (TFN)

333 766 162

See the Privacy note in the Taxpayer's declaration on page 15 of this return.

Are you an Australian resident?
 Y Print Y for yes or N for no.

Have you included any attachments?
 N Print Y for yes or N for no.

Your name

Title - for example, Mr, Mrs, Ms, Miss

Mrs

Surname or family name

Sheppard

Given names

Heather

Lynette

Has any part of your name changed since completing your last tax return?

 N Print Y for yes or N for no.

If yes, print previous surname.

Your postal address

C/- Home Tax Rowville

PO Box 328

Has your postal address changed since completing your last tax return?

 Print Y for yes or N for no.

Endeavour Hills

VIC

3802

Your home address

If the same as your current postal address, print AS ABOVE.

9 Wendy Court

Hampton Park

VIC

3976

Your mobile phone number
Your daytime phone number
(if different from your mobile phone number above)

Area code 03

Phone number 97061121

Your email address

Your contact details may be used by the ATO:

- to advise you of tax return lodgment options
- to correspond with you with regards to your taxation and superannuation affairs
- to issue notices to you, or
- to conduct research and marketing.

Your date of birth

If you were under 18 years of age on 30 June 2016 you must complete item A1 on page 5 of this tax return.

11/05/1961

Final tax return
 N

If you know this is your final tax return, print FINAL.

Electronic funds transfer (EFT)

We need your financial institution details to pay any refund owing to you, even if you have provided them to us before. Write the BSB number, account number and account name below.

BSB number (must be six digits) 733374

Account number 522872

Use Agent Trust Account?

 N

Account name (for example, JQ Citizen. Do not show the account type, such as cheque, savings, mortgage offset)

RJ & HL Sheppard

Income

1 Salary or wages

Your main salary and wage occupation

Administrator - Office

Occupation code **X** 512111

Payer	Allowances	Lump A	Lump B	Tax Withheld	Gross
Trans-mit Pty Ltd				ABN: 12 100 711 957 12,376.00	57,200

Total tax withheld Add up the **B** boxes. **\$** 12,376.00

15 Net income or loss from business

Primary production - transferred from Y item P8. **B** / / LOSS

Net income or loss from carrying on a business of investing	2,472	/	<input type="checkbox"/>
Net income or loss from carrying on a rental property business		/	<input type="checkbox"/>
Other income or loss relating to item 15		/	<input type="checkbox"/>

Non-primary production - transferred from Z item P8. **C** / 2,472 / LOSS

If you show a loss at B or C you must complete item P9 on page 14.

Tax withheld - voluntary agreement **D**

Tax withheld where Australian business number not quoted **W**

Tax withheld - foreign resident withholding **E**

Tax withheld - labour hire or other specified payments **F**

Taxpayer eligible for Small Business income tax offset (Y/N) ? Y

Net small business income **A** 2,472

Add :		Total amount in return
Item 15 Label B - Primary Production		0
Item 15 Label C - Non-Primary Production		2,472
Item 17 Labels N, R - FMD Withdrawals		0
Foreign source business income from item 19 or 20		
Business interest income		0
Business dividend income		0
Other business income not already shown		
Business losses which are not allowable deductions (excluding net capital gains)		
Less :		
Item 17 Label D - FMD deductible deposits		0
Other business deductions not already claimed at this item		

18 Capital gains Did you have a capital gains tax event during the year? **G** N Print Y for yes or N for no.

Have you applied an exemption or rollover? **M** / CODE

Net capital gain **A**

19 Foreign entities

Did you have either a direct or indirect interest in a controlled foreign company (CFC)? **I** N Print Y for yes or N for no.

CFC income **K**

Have you ever, either directly or indirectly, caused the transfer of property-including money-or services to a non-resident trust estate? **W** N Print Y for yes or N for no.

Transferor trust income **B**

20 Foreign source income and foreign assets or property

During the year did you own, or have an interest in, assets located outside Australia which had a total value of AUD\$50,000 or more? **P** N Print Y for yes or N for no.

21 Rent Gross rent **P** 9,000

Interest deductions **Q** 9,708

Capital works deductions **F**

Other rental deductions **U** 524

Net rent P less (Q + F + U) 1,232 / LOSS

TOTAL INCOME OR LOSS Add up the income amounts and deduct any loss amount in the F boxes.	58,440	LOSS	
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Deductions

D5 Other work related expenses	E	295	
TOTAL DEDUCTIONS Items D1 to D add up the I boxes		295	
SUBTOTAL	TOTAL INCOME OR LOSS less TOTAL DEDUCTIONS	58,145	LOSS
TAXABLE INCOME OR LOSS	Subtract amounts at F and Z item L1 from amount at SUBTOTAL \$	58,145	LOSS
TOTAL TAX OFFSETS	Items T2 and T -add up the J boxes U	0	

M2 Medicare levy surcharge (MLS)

THIS ITEM IS COMPULSORY

If you do not complete this item you may be charged the full Medicare levy surcharge.

For the whole period 1 July 2015 to 30 June 2016, were you and all your dependants (including your spouse) - if you had any - covered by private patient HOSPITAL cover? **E** Y Print Y for yes or N for no.

Number of days NOT liable for surcharge **A**

Private health insurance policy details

You must read Private health insurance policy details in the tax return instructions before completing this item. Fill all the labels below unless directed in the instructions.

Health insurer ID B <input type="text" value="AUF"/>	Membership number C <input type="text" value="171210131"/>
Your premiums eligible for Australian Government rebate J <input type="text" value="2,432"/>	Your Australian Government rebate received K <input type="text" value="677"/>
Benefit code L <input type="text" value="30"/>	Tax claim code. Read the tax return instructions. CODE <input type="text" value="E"/>

Health insurer ID B <input type="text" value="AUF"/>	Membership number C <input type="text" value="171210131"/>
Your premiums eligible for Australian Government rebate J <input type="text" value="870"/>	Your Australian Government rebate received K <input type="text" value="233"/>
Benefit code L <input type="text" value="31"/>	Tax claim code. Read the tax return instructions. CODE <input type="text" value="E"/>

Income tests

You must complete this section.

If you had a spouse during 2015-16 you must also complete Spouse details – married or de facto on page 7.

If the amount is zero, write 0.

IT1 Total reportable fringe benefits amount	W	<input type="text" value="0"/>	
IT2 Reportable employer superannuation contributions	T	<input type="text" value="0"/>	
IT3 Tax-free government pensions	U	<input type="text" value="0"/>	
IT4 Target foreign income	V	<input type="text" value="0"/>	
IT5 Net financial investment loss	X	<input type="text" value="0"/>	

IT6 Net rental property loss

Y 1,232

Net rent from partnerships - Item 13	0	
Net rent - Item 15	0	
Net rent from partnerships/sole trader activities - Item 16	0	
Total foreign rental income or loss - Items 20R, 24Y less D15J	0	
Net rent - Item 21	1,232	L
Less: Deduction - Item D6	0	
TOTAL (transfers to Label Y - LOSS amounts only)	1,232	L

IT7 Child support you paid

Z 0

(For ATO validation only)

Adjusted taxable income

59,377 /

Estimated total income

70,917 /

Estimated eligible income

61,917

Spouse details-married or de facto

Use related ref details?

Y SHEPPRJ

If you had a spouse during 2015-16, you must complete Spouse details - married or de facto.

We need the information included in this section to assess your tax accurately.

If you did not have a spouse, go to page 8.

Your spouse's name

If you had more than one spouse during 2015-16 print the name of your spouse on 30 June 2016 or your last spouse.

Surname or family name

First given name Other given names

Your spouse's date of birth **K**

Your spouse's gender Male Female Indeterminate

Period you had a spouse - married or de facto

Did you have a spouse for the full year - 1 July 2015 to 30 June 2016? **L** No Yes

If you did not have a spouse for the full year, write the dates you had a spouse between 1 July 2015 and 30 June 2016. **M**
to **N**

Did your spouse die during the year? No Yes

This information relates to your spouse's income

You must complete all labels

Pre-fill using related ref return details?
(Related ref for spouse details above must be answered Y)

 Y

Your spouse's 2015-16 taxable income

 O 73,980

Your spouse's share of trust income on which the trustee is assessed under section 98 and which has not been included in spouse's taxable income

 T

Distributions to your spouse on which family trust distribution tax has been paid and which your spouse would have had to show as assessable income if the tax had not been paid

 U

Your spouse's total reportable fringe benefits amounts

 S

Amount of Australian Government pensions and allowances (see Q6 Australian Government pensions and allowances in the tax return instructions) that your spouse received in 2015-16 (exclude exempt pension income)

 P

Amount of exempt pension income (see Spouse details - married or de facto in the instructions) that your spouse received in 2015-16. Do not include any amount paid under the Military Rehabilitation and Compensation Act 2004

 Q

Amount of your spouse's reportable superannuation contributions (which is the total of reportable employer superannuation contributions and deductible personal superannuation contributions)

 A

Other specified exempt payments that your spouse received (see Spouse details - married or de facto in the instructions)

 B

Your spouse's target foreign income

 C

Your spouse's total net investment loss (total of net financial investment loss and net rental property loss)

 D 1,232

Child support your spouse paid

 E

Your spouse's taxed element of a superannuation lump sum for which the tax rate is zero (see M2 Medicare levy surcharge in the tax return instructions)

 F

Spouse's total ATI
(ATO validation purpose only)

 75,212 /

Business and professional items section

P1 Personal services income (PSI)

Print X in the appropriate box.

Did you receive any personal services income?

 YES X Read on.

 NO Go to item P2.

Part A

Did you satisfy the results test?

 P NO Read on.

 YES X Go to item P2.

P2 Description of main business or professional activity

 Industry code A 82120

P3 Number of business activities

 B 1

P5 Business name of main business and Australian business number (ABN)

Folk Art Haven	
	ABN

P6 Business address of main business

9 Wendy Court			
Hampton Park	Suburb	VIC	State
		<input type="checkbox"/> D 3976	Postcode

P8 Business income and expenses

Income	Primary production	Non-primary production	Totals
Gross payments where Australian Business Number not quoted C	<input type="text"/>	D <input type="text"/>	<input type="text"/>
Gross payments subject to foreign resident withholding		B <input type="text"/>	<input type="text"/>
Gross payments - voluntary agreement E	<input type="text"/>	F <input type="text"/>	<input type="text"/>
Gross payments - labour hire or other specified payments N	<input type="text"/>	O <input type="text"/>	<input type="text"/>
Assessable government industry payments G	<input type="text"/> / <input type="text"/> TYPE	H <input type="text"/> / <input type="text"/> TYPE	<input type="text"/>
Other business income I	<input type="text"/> / <input type="text"/>	J 4,717 / <input type="text"/>	4,717 / <input type="text"/>
Total business income	<input type="text"/> / <input type="text"/>	4,717 / <input type="text"/>	4,717 / <input type="text"/>

Expenses	Primary production	Non-primary production	Totals
Opening stock	<input type="text"/>	<input type="text"/>	K <input type="text"/>
Purchases and other costs	<input type="text"/>	<input type="text"/>	L <input type="text"/>
Closing stock	<input type="text"/> / <input type="text"/>	<input type="text"/> / <input type="text"/>	M <input type="text"/> / <input type="text"/> TYPE
Cost of sales (K + L - M)	<input type="text"/> / <input type="text"/>	<input type="text"/> / <input type="text"/>	<input type="text"/> / <input type="text"/>
Foreign resident withholding expenses		<input type="text"/>	U <input type="text"/>
Contractor, sub-contractor and commission expenses	<input type="text"/>	<input type="text"/>	F <input type="text"/>
Superannuation expenses	<input type="text"/>	<input type="text"/>	G <input type="text"/>
Bad debts	<input type="text"/>	<input type="text"/>	I <input type="text"/>
Lease expenses	<input type="text"/>	<input type="text"/>	J <input type="text"/>
Rent expenses	<input type="text"/>	<input type="text"/>	K <input type="text"/>
Interest expenses within Australia	<input type="text"/>	<input type="text"/>	Q <input type="text"/>
Interest expenses overseas	<input type="text"/>	<input type="text"/>	R <input type="text"/>
Depreciation expenses	<input type="text"/>	110	M 110
Motor vehicle expenses	<input type="text"/> / <input type="text"/>	1,188 S	N 1,188 / <input type="text"/> TYPE S
Repairs and maintenance	<input type="text"/>	<input type="text"/>	O <input type="text"/>
All other expenses	<input type="text"/>	947	P 947
Total expenses	<input type="text"/> / <input type="text"/>	2,245 / <input type="text"/>	<input type="text"/> 2,245 / <input type="text"/>

Reconciliation items

Section 40-880 deduction

A

Business deduction for project pool

L

Landcare operations and business deduction for decline in value of water facility, fencing asset and fodder storage asset

W

Income reconciliation adjustments

 /
 /

X

 /

Expense reconciliation adjustments

 /
 /

H

 /

Net income or loss from business this year

B

 /

C

 /
 /

Deferred non-commercial business losses from a prior year

D

E

Net income or loss from business

Y

 /

Z

 /
 /

Transfer the amounts at labels Y and Z to item 15 on page 9.

Taxpayer's declaration

Read and sign the declaration after completing your tax return, including the Supplementary section, Business and professional items section and other schedules if applicable.

I declare that:

- the information provided to my registered tax agent for the preparation of this tax return is true and correct, and
- I authorise my registered tax agent to lodge this tax return.

Taxpayer's Signature

Date

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

Important: The tax law imposes heavy penalties for giving false or misleading information.

The ATO will issue your assessment based on your tax return. However, the ATO has some time to review your tax return, and issue an amended assessment if a review shows inaccuracies that change the assessment. The standard review period is two years but for some taxpayers it is four years.

Privacy:

The ATO is authorised by the Taxation Administration Act 1953 to request your tax file number (TFN). We will use your TFN to identify you in our records. It is not an offence not to provide your TFN. However if you do not provide your TFN, your assessment may be delayed.

Taxation law authorises the ATO to collect information and to disclose it to other government agencies. For information about your privacy go to ato.gov.au/privacy

Tax agent's declaration

I,

declare that this tax return has been prepared in accordance with information supplied by the taxpayer, that the taxpayer has given me a declaration stating that the information provided to me is true and correct and that the taxpayer has authorised me to lodge the tax return.

Agent's signature

Date

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

Client's reference

Contact name

Agent's telephone number

Area code	Telephone number
<input type="text" value="03"/>	<input type="text" value="97061121"/>

Agent's reference number

Depreciation Worksheet

2016

Title Plant & Equipment
 Transfer to 4 Business Folk Art Haven
 Private Use % (default private use % for this worksheet)

Total Cost	Opening	Acquisition Date	Acquisition Cost	Total Value	Rate %	Type P/D	Decline in Value	Private Portion	Closing
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All Assets (1)

Studio Set Up									
4,400	3,203		0	3,203	2.50	P	110	0	3,093

Total Cost	Opening	Acquisition Cost	Total Value	Decline in Value	Private	Closing
4,400	3,203	0	3,203	110	0	3,093

	Deduct for Private Use	<input type="text" value="0"/>
	Net Depreciation	<input type="text"/>
Disposals: [Deduct for Private Use	<input type="text"/>
	Net Adjustment	<input type="text"/>
	Total Claimed for Depreciation	<input type="text" value="110"/>

Total Assets - 1 [On hand the full year - 1, Acquisitions - 0, Disposals - 0]

Work Related Expenses Schedule 2016

D5 Other work related expenses

Please explain how each expense claimed (except FID, union, or overtime meal allowance) related to your work.

Books & stationery for work related.

Other work related expenses

Expense type	B	Details of "O" code	
Business		Amount	295
Evidence / calculation code	I	Point and Claim Receipts	Inv/Receipt
			Claimed \$ 295

		Total claimed \$	295
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Taxpayer declaration:

I declare that the information I have given is true and correct and that I hold the necessary evidence to support my claims.

Signature Date

Tax agent declaration:

I declare that I have explained to my client the information necessary to complete this form.

Signature Date

2016 Rental Property Schedule

Address of Rental Property

7 Wendy Court

Hampton Park

VIC

3976

Date property first earned rental income

05/07/2011

Number of weeks property was rented this year

52

Private Use %

Ownership**% owned**

Sheppard	Rodney	SHEPPRJ	50.00
Sheppard	Heather	SHEPPHL	50.00

Income**Return**

Gross rental income	18,000	9,000
Other rental related income		
Gross Rent	18,000	9,000

Expenses**Total****Prv %****Return**

F Borrowing Expenses	112	56
K Insurance	936	468
L Interest On Loans	19,416	9,708

Total expenses

20,464

10,232

Net Rent

2,464

/ L

1,232

/ L

Business Worksheet**Non-Primary Production 2016**

Business Name	Folk Art Haven		
Business Activity	Art School Operation	82120	
Place of Business	9 Wendy Court		
	Hampton Park		
	VIC	3976	
Ceased business during year	<input type="checkbox"/>	Commenced business during year	<input type="checkbox"/>
Number of business activities	<input type="text" value="1"/>	Consolidated subsidiary member	<input type="checkbox"/>

INCOME**Description** Art School Supplies

Sales	<input type="text" value="4,717"/>
Plus goods for own use	<input type="text"/>
Gross Sales	<input type="text" value="4,717"/>
Less cost of goods sold:	
Opening stock	<input type="text"/>
Plus purchases	<input type="text"/>
Less Closing stock	- <input type="text"/>
Cost of sales	<input type="text" value="0"/>

Trading income / **Gross trading income** / **Plus:****Business income** / **EXPENSES**

Less:			Private %
	Transf in: Deprec \$110	<input type="text" value="110"/>	
20	Insurance Premiums	<input type="text" value="572"/>	
34	Printing And Stationery	<input type="text" value="375"/>	
28	Motor (set Rate) S	<input type="text" value="1,188"/>	
	Less expenses	<input type="text" value="2,245"/>	

Plus Reconciliation to Taxable Income/Loss

<input type="text"/>	<input type="text"/>	/	<input type="checkbox"/>	<input type="checkbox"/>
TOTAL BUSINESS INCOME/LOSS	<input type="text" value="2,472"/>	/	<input type="checkbox"/>	

DECLARATIONS

Depreciating assets first deducted	[]	Intangible	[]
		Other	[]
Termination value of depreciating assets	[]	Self-assessed effective life?	[]
		Intangible	[]
		Other	[]

Did you recalculate the effective life for any assets this year?

Total adjustable values at end of year	[3,093]
Assessable balancing adjustments on disposal of intangible depreciating assets	[]
Deductible balancing adjustments on disposal of intangible depreciating assets	[]
Debtors	[]
Current assets	[]
Total assets	[]
Creditors	[]
Current liabilities	[]
Total liabilities	[]
Closing stock code	[]
Trading stock election	[]
Salary and wage action code	[]
Fringe benefit employee contributions	[]

Did you sell any goods or services using the internet? []

Hours taken to prepare business and professional items schedule []

Unpaid present entitlement to a private company [] / []

Income Tax Return Tax Estimate

2016

Mrs Heather Lynette Sheppard

TFN: 333 766 162

Tax Payable for Individual

Taxable Income	58,145
Tax Free Part	18,200
Tax Payable on Taxable Income	10,444.12

Sub-Total \$ 10,444.12

Less Offsets:	Offsets (T2 to T9)	0.00
	Private Health Insurance Offset	0.00
	Seniors / Pension / Beneficiary Offset	0.00
	Small business income offset (TNSBI: 2472)	22.20
	Low Income Offset	127.83
	Lump Sum	0.00
	Other Offsets	0.00
	Sub-Total \$	150.03
		<hr/>
		10,294.09

Plus:	Medicare Levy	1,162.90
	Sub-Total \$	1,162.90
		<hr/>
		11,456.99

Less Credits:	Tax withheld - salary & wage type income	12,376.00
	Arrears tax withheld	0.00
	Foreign Tax Credits	0.00
	TFN Amounts (credits)	0.00
	Franking Tax Offset (refundable)	0.00
	Other Refundable Credits	0.00
	Other Amounts withheld - ABN,Vol,Labour,Foreign	0.00
	PAYG Income Tax Instalments	0.00
	Sub-Total \$	12,376.00
		<hr/>
	Estimated Tax Refund	919.01
		<hr/> <hr/>

DISCLAIMER

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This estimate is provided without warranty of any kind.
It is subject to legislative changes and includes estimates of currently unknown rates.
WARNING : Amounts shown may be adjusted by amounts not included in this return.

Sensitive (when completed)