

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 However, you cannot lodge your income tax form electronically if you do not quote your TFN.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 336 196 383

Year 2018

Name Mr Rodney John 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

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

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 2017 to 30 June 2018

2018

Your tax file number (TFN)

336 196 383

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

Are you an Australian resident?

 Print **Y** for yes or **N** for no.

Have you included any attachments?

 Print **Y** for yes or **N** for no.

Your name

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

Mr

Surname or family name

Sheppard

Given names

Rodney

John

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

 Print **Y** for yes or **N** for no.

 To find out how to update your name on our records, go to ato.gov.au/updatedetails or phone 13 28 61

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 2018 you must complete item A1 on page 5 of this tax return.

06/05/1962

Final tax return

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

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

RJ & HL Sheppard

Use Agent Trust Account?

Income

1 Salary or wages

Your main salary and wage occupation

Computer Programmer Occupation code 261312

Payer	Allowances	Lump A	Lump B	Tax Withheld	Gross
Trans-mit Pty Ltd				ABN: 12 100 711 957 12,120.00	52,235

Total tax withheld Add up the boxes. \$ 12,120.00

10 Gross interest

Gross interest 10

Tax file number amounts withheld from gross interest

Bank / Branch / Account	TFN amt	Gross amt
ING 42251886		1
U Bank 370660292		9

**Supplementary section
Income**

Refer to the supplement instructions before you complete item 13. If you are required to complete item 13 include deferred non-commercial business losses from a prior year at either X or Y as appropriate. Refer to the supplement instructions for the relevant code.

13 Partnerships and trusts

Non-primary production

Distribution from partnerships, less foreign income

Share of net income from trusts less capital gains, foreign income and franked distributions 494

Franked distributions from trusts 10,444

Landcare operations expenses

Other deductions relating to amounts shown at O, U and C TYPE

Show amount of:
Capital gains from trusts at item 18 on page 9 and Foreign income at item 19

Net non-primary production amount 9,950 LOSS

Share of credits from income and tax offsets

Share of credit for tax withheld where Australian business number not quoted

Share of franking credit from franked dividends 3,133.00

Share of credit for tax file number amounts withheld from interest, dividends and unit trust distributions

Credit for TFN amounts withheld from payments from closely held trusts

Share of credit for tax paid by trustee

Share of credit for foreign resident withholding amounts (excluding capital gains)

Share of National rental affordability scheme tax offset

Show amount of:
Credit for foreign resident capital gains withholding from trusts at item 18.

802 005 696 Y T I R And H Sheppard Family Trust

NPP income	Investments		Credits:	ABN	0.00
	Net rental			Franking	3,133.00
	Other	494 L		TFN	0.00
	PP Income	0		Closely held trusts	0.00
Franked distributions	Investments			Tax paid by trustee	
	Other	10,444		Foreign Resident Withholding	0.00
Net small business inc	Partnership			Rental Affordability Scheme	0.00
	Trust				

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** /

Total current year capital gains **H**

Net capital losses carried forward to later income years **V**

Credit for foreign resident capital gains withholding amounts **X**

You must print Y at G if you had an amount of a capital gain from a trust.

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**

Interest deductions **Q**

Capital works deductions **F**

Other rental deductions **U**

Net rent P less (Q + F + U) /

TOTAL INCOME OR LOSS Add up the income amounts and deduct any loss amount in the boxes. /

Deductions

TOTAL DEDUCTIONS Items D1 to **D** add up the boxes

SUBTOTAL TOTAL INCOME OR LOSS less TOTAL DEDUCTIONS /

TAXABLE INCOME OR LOSS Subtract amounts at **F** and **Z** item L1 from amount at SUBTOTAL /

TOTAL TAX OFFSETS Items T2 and **T** —add up the boxes

T8 Early stage venture capital limited partnership

Current year tax offset **K**

Tax offset carried forward from previous year **M**

T9 Early stage investor

Current year tax offset **L**

Tax offset carried forward from previous year **O**

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 2017 to 30 June 2018, 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 AUF Membership number C 171210131
Your premiums eligible for Australian Government rebate J 1,102 Your Australian Government rebate received K 286
Benefit code L 30 Tax claim code. Read the tax return instructions. CODE E

Health insurer ID B GMH Membership number C 334375
Your premiums eligible for Australian Government rebate J 959 Your Australian Government rebate received K 249
Benefit code L 30 Tax claim code. Read the tax return instructions. CODE E

Health insurer ID B GMH Membership number C 334375
Your premiums eligible for Australian Government rebate J 751 Your Australian Government rebate received K 191
Benefit code L 31 Tax claim code. Read the tax return instructions. CODE E

Spouse details—married or de facto

Use related ref details?

Y SHEPPHL

If you had a spouse during 2017-18, 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 2017-18 print the name of your spouse on 30 June 2018 or your last spouse.

Surname or family name Sheppard
First given name Heather Other given names Lynette

Your spouse's date of birth K 11/05/1961

Your spouse's gender Male Female X Indeterminate

Period you had a spouse - married or de facto

Did you have a spouse for the full year - 1 July 2017 to 30 June 2018? L No Yes X

If you did not have a spouse for the full year, write the dates you had a spouse between 1 July 2017 and 30 June 2018. 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)

Your spouse's 2017-18 taxable income

 49,519

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

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

Your spouse's total reportable fringe benefits amounts

Employers exempt from FBT under section 57A of the FBTA 1986

Employers not exempt from FBT under section 57A of the FBTA 1986

Amount of Australian Government pensions and allowances (see Q6 Australian Government pensions and allowances in the tax return instructions) that your spouse received in 2017-18 (exclude exempt pension income)

Amount of exempt pension income (see Spouse details - married or de facto in the instructions) that your spouse received in 2017-18. Do not include any amount paid under the Military Rehabilitation and Compensation Act 2004

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

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

Your spouse's target foreign income

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

 2,142

Child support your spouse paid

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)

Spouse's total ATI (ATO validation purpose only)

 /

Income tests

You must complete this section.

If you had a spouse during 2017-18 you must also complete Spouse details - married or de facto on page 7.

IT1 Total reportable fringe benefits amounts

If the amount is zero, write 0.

Total reportable fringe benefits amounts (for ATO validation only)

Employers exempt from FBT under section 57A of the FBTA 1986

 0

Employers not exempt from FBT under section 57A of the FBTA 1986

 0

IT2 Reportable employer superannuation contributions

 0

IT3 Tax-free government pensions

 0

IT4 Target foreign income

 0

IT5 Net financial investment loss

 0

IT6 Net rental property loss

 2,142

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	2,142	L
Less: Deduction - Item D6	0	
TOTAL (transfers to Label Y - LOSS amounts only)	2,142	L

IT7 Child support you paid

Z [] 0

(For ATO validation only)

Adjusted taxable income

62,195 / []

Estimated total income

71,195 / []

Estimated eligible income

52,235

Non-resident foreign income

[]

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

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, KHIAM BEE TOH

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 06/03/2019

Client's reference

SHEPPRJ

Contact name

Bee Toh

Agent's telephone number

Area code

03

Telephone number

97061121

Agent's reference number

74277005

Position held

[]

Rental Property Schedule 2018

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**

K Insurance	950	475
L Interest On Loans	21,334	10,667
Total expenses	22,284	11,142

Net Rent

4,284

/ L

2,142

/ L

Income Tax Return Tax Estimate

2018

Mr Rodney John Sheppard

TFN: 336 196 383

Tax Payable for Individual

Taxable Income	60,053
Tax Free Part	18,200
Tax Payable on Taxable Income	11,064.22

Sub-Total \$ 11,064.22

Less Offsets:	Offsets (T2 to T11)	0.00
	Private Health Insurance Offset	0.00
	Seniors / Pension / Beneficiary Offset	0.00
	Small business income offset	0.00
	Low Income Offset	99.21
	Lump Sum	0.00
	Other Offsets	0.00

Sub-Total \$ 99.21

10,965.01

Plus:	Medicare Levy	1,201.06
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Sub-Total \$ 1,201.06

12,166.07

Less Credits:	Tax withheld - salary & wage type income	12,120.00
	Arrears tax withheld	0.00
	Foreign Tax Credits	0.00
	TFN Amounts (credits)	0.00
	Franking Tax Offset (refundable)	3,133.00
	Other Refundable Credits	0.00
	Other Amounts withheld - ABN,Vol,Labour,Foreign	0.00
	PAYG Income Tax Instalments	0.00

Sub-Total \$ 15,253.00

3,086.93

Estimated Tax Refund

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)