
G Whipper Retirement Fund
Contribution Caps
For the Period From 1 July 2019 to 30 June 2020

Mr Anthony Whipper

Date of Birth: 5 Sep 1950
Age: 69 (at 30/06/2020)
Status: Member must meet work test criteria, other conditions apply

Contributions Summary

Non-Concessional

Prior Year Contributions

The 'Bring Forward Rule' was unavailable in previous 2 years; member was 65 or older

3-year cap in effect from previous years

N/A

Total non-concessional contributions in previous 2 years

N/A

Current Year Contributions	Note	Concessional	Non-Concessional
Caps	1,2	25,000.00	100,000.00
Cumulative Available Unused Cap	3	0.00	0.00
Contributions made (to this fund)	4	0.00	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		0.00	0.00
Amount above caps	5	0.00	0.00
Available		25,000.00	100,000.00

Notes

- 1 . 'Bring Forward Rule' can NOT be triggered this year; member was 65 or older
- 2 . Non-concessional cap shown applies to current year only
- 3 . Total Superannuation Balance was \$500,000 or more at 30 June 2019, member not eligible to make catch-up concessional contributions
- 4 . Excludes any unmatched deposits
- 5 . Any excess concessional contributions are treated as non-concessional

G Whipper Retirement Fund
Contribution Caps
For the Period From 1 July 2019 to 30 June 2020

Mrs Gail Whipper

Date of Birth: 23 Jan 1952
Age: 68 (at 30/06/2020)
Status: Member must meet work test criteria, other conditions apply

Contributions Summary

Non-Concessional

Prior Year Contributions

The 'Bring Forward Rule' was unavailable in previous 2 years; member was 65 or older
 3-year cap in effect from previous years
 Total non-concessional contributions in previous 2 years

N/A
 N/A

Current Year Contributions	Note	Concessional	Non-Concessional
Caps	1,2	25,000.00	100,000.00
Cumulative Available Unused Cap	3	0.00	0.00
Contributions made (to this fund)	4	8,447.40	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		8,447.40	0.00
Amount above caps	5	0.00	0.00
Available		16,552.60	100,000.00

Notes

- 1 . 'Bring Forward Rule' can NOT be triggered this year; member was 65 or older
- 2 . Non-concessional cap shown applies to current year only
- 3 . Total Superannuation Balance was \$500,000 or more at 30 June 2019, member not eligible to make catch-up concessional contributions
- 4 . Excludes any unmatched deposits
- 5 . Any excess concessional contributions are treated as non-concessional

Contributions Breakdown

<u>Income Type</u>	<u>Contribution Type</u>	<u>Amount</u>
Concessional	Employer	8,447.40
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	8,447.40
NonConcessional	Personal	0.00
	Spouse	0.00
	Child	0.00
	Transfers from reserve	0.00
	Foreign superannuation fund	0.00
	Contributions as allocated	0.00
Other	CGT small business 15-year exception	0.00
	CGT small business retirement exemption	0.00
	Government Co-Contributions	0.00
	Directed termination payment (taxed)	0.00
	Directed termination payment (untaxed)	0.00
	Personal injury election	0.00
	Downsizer Contribution	0.00
	Total Other contributions	0.00

Transactions

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
25/10/2019	Employer Mandated	2,274.30			smsfdataflow
21/01/2020	Employer Mandated	2,111.85			smsfdataflow
27/04/2020	Employer Mandated	2,111.85			smsfdataflow
23/06/2020	Employer Mandated	1,786.95			smsfdataflow
29/06/2020	Employer Mandated	162.45			smsfdataflow
Totals:		8,447.40			