

John Barkas Superannuation Fund
Contribution Caps
For the Period From 1 July 2019 to 30 June 2020

Mr John Barkas

Date of Birth: 25 Apr 1950
Age: 70 (at 30/06/2020)
Status: Only employer or personal contributions allowed subject to the work test

Contributions Summary

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	17,200.00	0.00
Contributions made (to this fund)	4	9,000.00	290.50
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		9,000.00	290.50
Amount above caps	5	0.00	0.00
Available		33,200.00	99,709.50

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 . Member may be 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	9,000.00
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	9,000.00
NonConcessional	Personal	290.50
	Spouse	0.00
	Child	0.00
	Transfers from reserve	0.00
	Foreign superannuation fund	0.00
	Contributions as allocated	290.50
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
28/08/2019	Employer Mandated	500.00			manual
10/09/2019	Employer Mandated	1,000.00			manual
10/09/2019	Employer Voluntary	4,500.00			manual
20/11/2019	Employer Mandated	1,000.00			manual
02/12/2019	Personal		290.50		manual
30/01/2020	Employer Mandated	1,000.00			manual
29/05/2020	Employer Mandated	1,000.00			manual

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Totals:

9,000.00

290.50