

McLean Superannuation Fund
Contribution Caps
For the Period From 1 July 2018 to 30 June 2019

Mr Christian McLean

Date of Birth: 6 Jan 1974
Age: 45 (at 30/06/2019)
Status: Member may be eligible for the bring forward rule, certain conditions apply

Contributions Summary

		Non-Concessional	
Prior Year Contributions			
Contributions for the previous 2 years are not confirmed			
3-year cap in effect from previous years		Unknown	
Total non-concessional contributions in previous 2 years		Unknown	
Current Year Contributions	Note	Concessional	Non-Concessional
Caps	1	25,000.00	100,000.00
Contributions made (to this fund)	2	10,610.00	207.05
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		10,610.00	207.05
Amount above caps	3	0.00	0.00
Available		14,390.00	99,792.95

Notes

- 1 . Non-concessional cap shown does NOT take prior year 'Bring Forward Rule' usage into account
- 2 . Excludes any unmatched deposits
- 3 . Any excess concessional contributions are treated as non-concessional

Contributions Breakdown

<u>Income Type</u>	<u>Contribution Type</u>	<u>Amount</u>
Concessional	Employer	10,610.00
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	10,610.00
NonConcessional	Personal	207.05
	Spouse	0.00
	Child	0.00
	Transfers from reserve	0.00
	Foreign superannuation fund	0.00
	Contributions as allocated	207.05
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
02/07/2018	Employer Voluntary	800.00			manual
15/08/2018	Employer Voluntary	800.00			manual
31/08/2018	Employer Voluntary	800.00			manual
28/09/2018	Employer Voluntary	800.00			manual
01/11/2018	Employer Voluntary	800.00			manual
30/11/2018	Employer Voluntary	800.00			manual
28/12/2018	Employer Voluntary	800.00			manual
01/02/2019	Employer Voluntary	800.00			manual
01/03/2019	Employer Voluntary	1,000.00			manual

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Date	Contribution Type	Concessional	Non-Concessional	Other	Source
01/04/2019	Employer Voluntary	800.00			manual
03/04/2019	Employer Voluntary	800.00			manual
30/04/2019	Employer Voluntary	800.00			manual
06/05/2019	Employer Voluntary	10.00			manual
31/05/2019	Employer Voluntary	800.00			manual
25/06/2019	Personal		207.05		manual
Totals:		10,610.00	207.05		

McLean Superannuation Fund
Contribution Caps
For the Period From 1 July 2018 to 30 June 2019

Mrs Kim McLean

Date of Birth: 10 Sep 1971
Age: 47 (at 30/06/2019)
Status: Member may be eligible for the bring forward rule, certain conditions apply

Contributions Summary

		Non-Concessional	
Prior Year Contributions			
Contributions for the previous 2 years are not confirmed			
3-year cap in effect from previous years			Unknown
Total non-concessional contributions in previous 2 years			Unknown
Current Year Contributions	Note	Concessional	Non-Concessional
Caps	1	25,000.00	100,000.00
Contributions made (to this fund)	2	10,400.00	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		10,400.00	0.00
Amount above caps	3	0.00	0.00
Available		14,600.00	100,000.00

Notes

- 1 . Non-concessional cap shown does NOT take prior year 'Bring Forward Rule' usage into account
- 2 . Excludes any unmatched deposits
- 3 . Any excess concessional contributions are treated as non-concessional

Contributions Breakdown

<u>Income Type</u>	<u>Contribution Type</u>	<u>Amount</u>
Concessional	Employer	10,400.00
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	10,400.00
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
02/07/2018	Employer Voluntary	800.00			manual
15/08/2018	Employer Voluntary	800.00			manual
31/08/2018	Employer Voluntary	800.00			manual
28/09/2018	Employer Voluntary	800.00			manual
01/11/2018	Employer Voluntary	800.00			manual
30/11/2018	Employer Voluntary	800.00			manual
28/12/2018	Employer Voluntary	800.00			manual
01/02/2019	Employer Voluntary	800.00			manual
01/03/2019	Employer Voluntary	800.00			manual

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Mrs Kim McLean

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
01/04/2019	Employer Voluntary	800.00			manual
03/04/2019	Employer Voluntary	800.00			manual
30/04/2019	Employer Voluntary	800.00			manual
31/05/2019	Employer Voluntary	800.00			manual
Totals:		10,400.00			