

Agent CAROLYN M TAYLOR
Client DARYL WORTHINGTON

TFN 328518275

Non-concessional contributions

Non-concessional contributions are made from **after tax** income and are not taxed in the super fund. Super funds report the contributions to us and we determine whether they are non-concessional contributions. The decisions made with this information can have tax consequences. We recommend independent financial advice specific to individual circumstances is obtained.

| Total superannuation | balance | at | 30 | June | 2020 |
|-----------------------------|---------|----|----|------|------|
| \$0.00 | | | | | |

Visit total superannuation balance to learn more.

| Financial year | |
|----------------|---|
| 2020-21 | ~ |

Current as at 23 April 2022

Remaining non-concessional contributions Cap available \$96,030.00

Contributions are within the non-concessional contributions cap.

The cap is \$96,085.00 as it is in an active bring forward arrangement.

| Description | Amount |
|---|-------------|
| Non-concessional contributions cap | \$96,085.00 |
| Non-concessional contributions | \$55.00 |
| Remaining non-concessional contributions cap until 30 June 2022 | \$96,030.00 |

Further considerations

- > If bring forward cap is exceeded, extra tax is due at the marginal tax rate or higher.
- > Unreleased excess concessional contributions will count towards the non-concessional contributions cap.
- > Refer to previous records or contact the fund(s) after 31 October to obtain more up-to-date information.