

Bokhara Plains Superannuation Fund
Contribution Caps
For the Period From 1 July 2019 to 30 June 2020

Mr Graham Finlayson

Date of Birth: 9 Apr 1967
Age: 53 (at 30/06/2020)
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 |
| Cumulative Available Unused Cap | 2 | 5,000.00 | 0.00 |
| Contributions made (to this fund) | 3 | 22,000.00 | 0.00 |
| Contributions made (to other funds) | | 0.00 | 0.00 |
| Contributions as allocated | | 22,000.00 | 0.00 |
| Amount above caps | 4 | 0.00 | 0.00 |
| Available | | 8,000.00 | 100,000.00 |

Notes

- 1 . Non-concessional cap shown does NOT take prior year 'Bring Forward Rule' usage into account
- 2 . Member may be eligible to make catch-up concessional contributions
- 3 . Excludes any unmatched deposits
- 4 . Any excess concessional contributions are treated as non-concessional

Contributions Breakdown

| <u>Income Type</u> | <u>Contribution Type</u> | <u>Amount</u> |
|------------------------|---|------------------|
| Concessional | Employer | 0.00 |
| | Personal | 22,000.00 |
| | Family and friends | 0.00 |
| | Foreign superannuation fund | 0.00 |
| | Transfers from reserve | 0.00 |
| | Contributions as allocated | 22,000.00 |
| 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 |
|------------|-------------------|------------------|------------------|-------|--------|
| 22/06/2020 | Personal | 22,000.00 | | | manual |
| | Totals: | 22,000.00 | | | |

Bokhara Plains Superannuation Fund
Contribution Caps
For the Period From 1 July 2019 to 30 June 2020

Mrs Catherine Finlayson

Date of Birth: 11 Jun 1969
Age: 51 (at 30/06/2020)
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 |
| Cumulative Available Unused Cap | 2 | 5,000.00 | 0.00 |
| Contributions made (to this fund) | 3 | 23,000.00 | 0.00 |
| Contributions made (to other funds) | | 0.00 | 0.00 |
| Contributions as allocated | | 23,000.00 | 0.00 |
| Amount above caps | 4 | 0.00 | 0.00 |
| Available | | 7,000.00 | 100,000.00 |

Notes

- 1 . Non-concessional cap shown does NOT take prior year 'Bring Forward Rule' usage into account
- 2 . Member may be eligible to make catch-up concessional contributions
- 3 . Excludes any unmatched deposits
- 4 . Any excess concessional contributions are treated as non-concessional

Contributions Breakdown

| <u>Income Type</u> | <u>Contribution Type</u> | <u>Amount</u> |
|------------------------|---|------------------|
| Concessional | Employer | 0.00 |
| | Personal | 23,000.00 |
| | Family and friends | 0.00 |
| | Foreign superannuation fund | 0.00 |
| | Transfers from reserve | 0.00 |
| | Contributions as allocated | 23,000.00 |
| 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 |
|------------|-------------------|------------------|------------------|-------|--------|
| 22/06/2020 | Personal | 23,000.00 | | | manual |
| | Totals: | 23,000.00 | | | |