

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

Mr Ivan Tomas

Date of Birth: 9 Nov 1964
Age: 55 (at 30/06/2020)
Status: Member may be eligible for the bring forward rule, certain conditions apply

Contributions Summary

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	7,650.00	0.00
Contributions made (to this fund)	3	21,200.00	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		21,200.00	0.00
Amount above caps	4	0.00	0.00
Available		11,450.00	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	7,200.00
	Personal	14,000.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	21,200.00
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
01/08/2019	Employer Mandated	600.00			manual
03/09/2019	Employer Mandated	600.00			manual
01/10/2019	Employer Mandated	600.00			manual
25/10/2019	Employer Mandated	600.00			manual
12/11/2019	Employer Mandated	600.00			manual
05/12/2019	Employer Mandated	600.00			manual
07/01/2020	Employer Mandated	600.00			manual
04/02/2020	Employer Mandated	600.00			manual

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Date	Contribution Type	Concessional	Non-Concessional	Other	Source
03/03/2020	Employer Mandated	600.00			manual
31/03/2020	Employer Mandated	600.00			manual
04/05/2020	Employer Mandated	600.00			manual
25/05/2020	Personal	14,000.00			manual
01/06/2020	Employer Mandated	600.00			manual
	Totals:	21,200.00			

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

Mrs Gabrielle Tomas

Date of Birth: 8 May 1968
Age: 52 (at 30/06/2020)
Status: Member may be eligible for the bring forward rule, certain conditions apply

Contributions Summary

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	7,550.00	0.00
Contributions made (to this fund)	3	21,200.00	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		21,200.00	0.00
Amount above caps	4	0.00	0.00
Available		11,350.00	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	7,200.00
	Personal	14,000.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	21,200.00
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
01/08/2019	Employer Mandated	600.00			manual
03/09/2019	Employer Mandated	600.00			manual
01/10/2019	Employer Mandated	600.00			manual
25/10/2019	Employer Mandated	600.00			manual
12/11/2019	Employer Mandated	600.00			manual
05/12/2019	Employer Mandated	600.00			manual
07/01/2020	Employer Mandated	600.00			manual
04/02/2020	Employer Mandated	600.00			manual

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

Mrs Gabrielle Tomas

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
03/03/2020	Employer Mandated	600.00			manual
31/03/2020	Employer Mandated	600.00			manual
04/05/2020	Employer Mandated	600.00			manual
25/05/2020	Personal	14,000.00			manual
01/06/2020	Employer Mandated	600.00			manual
	Totals:	21,200.00			