

Deegan Superannuation Fund

Contribution Caps

For the Period From 1 July 2021 to 30 June 2022

Mr Stephen Deegan

Date of Birth: 30 Jan 1950
Age: 72 (at 30/06/2022)
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
 Total non-concessional contributions in previous 2 years

Non-Concessional

N/A
 N/A

Current Year Contributions	Note	Concessional	Non-Concessional
Caps	1,2	27,500.00	110,000.00
Cumulative Available Unused Cap	3	0.00	0.00
Contributions made (to this fund)	4	0.00	75,000.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		0.00	75,000.00
Amount above caps	5	0.00	0.00
Available		27,500.00	35,000.00

Notes

- 'Bring Forward Rule' can NOT be triggered this year; member was 67 or older
- Non-concessional cap shown applies to current year only
- Total Superannuation Balance was \$500,000 or more at 30 June 2021, member not eligible to make catch-up concessional contributions
- Excludes any unmatched deposits
- 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	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	0.00
NonConcessional	Personal	75,000.00
	Spouse	0.00
	Child	0.00
	Transfers from reserve	0.00
	Foreign superannuation fund	0.00
	Contributions as allocated	75,000.00
Other	CGT small business 15-year exemption	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
	COVID-19 Re-Contribution	0.00
	Total Other contributions	0.00

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Transactions

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
28/06/2022	Personal		25,000.00		manual
29/06/2022	Personal		25,000.00		manual
30/06/2022	Personal		25,000.00		manual
Totals:			75,000.00		

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Ms Sarah Appleby

Date of Birth: 26 Sep 1954
Age: 67 (at 30/06/2022)
Status: Member must meet work test criteria, other conditions apply

Contributions Summary

Prior Year Contributions		Non-Concessional	
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	27,500.00	110,000.00
Cumulative Available Unused Cap	2	15,000.00	0.00
Contributions made (to this fund)	3	27,815.17	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		27,815.17	0.00
Amount above caps	4	0.00	0.00
Available		14,684.83	110,000.00

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	315.17
	Personal	27,500.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	27,815.17
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 exemption	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
	COVID-19 Re-Contribution	0.00
Total Other contributions		0.00

Transactions

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
28/03/2022	Personal	25,000.00			manual
26/05/2022	Employer Mandated	102.13			manual
26/05/2022	Employer Mandated	103.31			manual
26/05/2022	Employer Mandated	109.73			manual
28/06/2022	Personal	2,500.00			manual

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Ms Sarah Appleby

Totals:	27,815.17
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