

**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**

<b>Prior Year Contributions</b>	<b>Non-Concessional</b>
The 'Bring Forward Rule' was unavailable in previous 2 years; member was 65 or older	
3-year cap in effect from previous years	N/A
Total non-concessional contributions in previous 2 years	N/A

<b>Current Year Contributions</b>	<b>Note</b>	<b>Concessional</b>	<b>Non-Concessional</b>
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		<u>27,500.00</u>	<u>35,000.00</u>

**Notes**

- 1 . 'Bring Forward Rule' can NOT be triggered this year; member was 67 or older
- 2 . Non-concessional cap shown applies to current year only
- 3 . Total Superannuation Balance was \$500,000 or more at 30 June 2021, member not eligible to make catch-up concessional contributions
- 4 . Excludes any unmatched deposits
- 5 . Any excess concessional contributions are treated as non-concessional

**Contributions Breakdown**

<u>Income Type</u>	<u>Contribution Type</u>	<u>Amount</u>
<b>Concessional</b>	Employer	0.00
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	<b>Contributions as allocated</b>	<b>0.00</b>
<b>NonConcessional</b>	Personal	75,000.00
	Spouse	0.00
	Child	0.00
	Transfers from reserve	0.00
	Foreign superannuation fund	0.00
	<b>Contributions as allocated</b>	<b>75,000.00</b>
<b>Other</b>	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
	<b>Total Other contributions</b>	<b>0.00</b>

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**Mr Stephen Deegan**

**Transactions**

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

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**For the Period From 1 July 2021 to 30 June 2022**

**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**

<b>Prior Year Contributions</b>		<b>Non-Concessional</b>	
Contributions for the previous 2 years are not confirmed			Unknown
3-year cap in effect from previous years			Unknown
Total non-concessional contributions in previous 2 years			Unknown
<b>Current Year Contributions</b>	<b>Note</b>	<b>Concessional</b>	<b>Non-Concessional</b>
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>
<b>Concessional</b>	Employer	315.17
	Personal	27,500.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	<b>Contributions as allocated</b>	<b>27,815.17</b>
<b>NonConcessional</b>	Personal	0.00
	Spouse	0.00
	Child	0.00
	Transfers from reserve	0.00
	Foreign superannuation fund	0.00
	<b>Contributions as allocated</b>	<b>0.00</b>
<b>Other</b>	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
	<b>Total Other contributions</b>	<b>0.00</b>

**Transactions**

<b>Date</b>	<b>Contribution Type</b>	<b>Concessional</b>	<b>Non-Concessional</b>	<b>Other</b>	<b>Source</b>
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**

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<b>Totals:</b>	<b>27,815.17</b>
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