

ABEGG FAMILY SUPERANNUATION FUND

Contributions Breakdown Report

For The Period 01 July 2021 - 30 June 2022



Summary

Member	D.O.B	Age (at 30/06/2021)	Total Super Balance (at 30/06/2021) *1	Concessional	Non-Concessional	Other	Reserves	Total
Abegg , Elizabeth	Provided	45	211,941.82	27,500.00	0.00	0.00	0.00	27,500.00
Abegg, John	Provided	41	194,445.30	27,816.67	0.00	0.00	0.00	27,816.67
All Members				55,316.67	0.00	0.00	0.00	55,316.67

*1 TSB can include information external to current fund's transaction records. The amount is per individual across all funds.

Contribution Caps

Member	Contribution Type	Contributions	Cap	Current Position
Abegg , Elizabeth	Concessional	27,500.00	27,500.00	At Limit
	Non-Concessional	0.00	110,000.00	110,000.00 Below Cap
Abegg, John	Concessional	27,816.67	28,969.61	1,152.94 Below Cap
	(5 year carry forward cap available)			
	Non-Concessional	0.00	110,000.00	110,000.00 Below Cap

Carry Forward Unused Concessional Contribution Cap

Member	2017	2018	2019	2020	2021	2022	Current Position
Abegg , Elizabeth							
Concessional Contribution Cap	30,000.00	25,000.00	25,000.00	25,000.00	25,000.00	27,500.00	
Concessional Contribution	1,583.33	25,000.00	25,000.00	25,000.00	25,000.00	27,500.00	
Unused Concessional Contribution	0.00	0.00	0.00	0.00	0.00	0.00	
Cumulative Carry Forward Unused	N/A	N/A	0.00	0.00	0.00	0.00	
Maximum Cap Available	30,000.00	25,000.00	25,000.00	25,000.00	25,000.00	27,500.00	At Limit
Total Super Balance	0.00	92,579.25	119,989.98	139,874.88	157,303.90	211,941.82	
Abegg, John							
Concessional Contribution Cap	30,000.00	25,000.00	25,000.00	25,000.00	25,000.00	27,500.00	
Concessional Contribution	0.00	24,483.37	25,116.71	23,850.03	24,680.36	27,816.67	
Unused Concessional Contribution	0.00	0.00	0.00	1,149.97	319.64	0.00	
Cumulative Carry Forward Unused	N/A	N/A	0.00	0.00	1,149.97	1,469.61	
Maximum Cap Available	30,000.00	25,000.00	25,000.00	25,000.00	26,149.97	28,969.61	1,152.94 Below Cap
Total Super Balance	0.00	79,701.12	106,108.38	126,252.87	143,076.64	194,445.30	

NCC Bring Forward Caps

Member	Bring Forward Cap	2019	2020	2021	2022	Total	Current Position
Abegg , Elizabeth	N/A	0.00	0.00	0.00	0.00	N/A	Bring Forward Not Triggered
Abegg, John	N/A	0.00	0.00	0.00	0.00	N/A	Bring Forward Not Triggered

Abegg , Elizabeth

		Ledger Data					SuperStream Data				
Date	Transaction Description	Contribution Type	Concessional	Non-Concession	Other	Reserves	Contribution	Employer	Concessional	Non-Concess	Other
14/07/2021	SUPER CONT EA JA	Personal - Concessional	27,500.00								
Total - Abegg , Elizabeth			27,500.00	0.00	0.00	0.00			0.00	0.00	0.00

Abegg, John

		Ledger Data					SuperStream Data				
Date	Transaction Description	Contribution Type	Concessional	Non-Concession	Other	Reserves	Contribution	Employer	Concessional	Non-Concess	Other
01/07/2021	SuperChoice P/L PC250621-178789022	Employer	316.67								
14/07/2021	SUPER CONT EA JA	Personal - Concessional	27,500.00								
Total - Abegg, John			27,816.67	0.00	0.00	0.00			0.00	0.00	0.00

Total for All Members	55,316.67	0.00	0.00	0.00
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Notice of intent to claim or vary a deduction for personal super contributions

Section A: Your details

1 Tax file number (TFN)

PROVIDED

i The ATO does not collect this information provided on this form. This form is to assist you in providing details to your super fund. Your super fund is authorised to request your personal details, including your TFN, under the *Superannuation Industry (Supervision) Act 1993*, the *Income Tax Assessment Act 1997* and the *Taxation Administration Act 1953*. It is not an offence not to provide your TFN. However, if you do not provide your TFN, and your super fund doesn't already hold your TFN, they will not be permitted to accept the contribution(s) covered by this notice. For more information about your privacy please contact the entity you are providing this form to.

2 Name

Title:

Family name

ABEGG

First given name

ELIZABETH

Other given names

3 Date of birth

PROVIDED

4 Current postal address

79 ARMSTRONG LANE

Suburb/town/locality

BROKEN HEAD

Country if outside of Australia

State/territory

NSW

(Australia only)

Postcode

2481

(Australia only)

5 Daytime phone number (include area code)

Section B: Super fund's details

6 Fund name

ABEGG FAMILY SUPERANNUATION FUND

7 Fund Australian business number (ABN)

88779554637

8 Member account number

ABEELI00001A

9 Unique Superannuation Identifier (USI) (if known)

Section C: Contribution details

10 Personal contribution details

Is this notice varying an earlier notice?

No ☒

Yes ☐

If you answered 'No' complete the **Original Notice to Claim a Tax Deduction** section below.

If you answered 'Yes' complete the **Variation of previous valid notice of intent** section below.

ORIGINAL NOTICE TO CLAIM A TAX DEDUCTION

11 Financial year ended 30 June 2022

12 My personal contributions to this fund in the above financial year

\$ 27500.00

13 The amount of these personal contributions I will be claiming as a tax deduction

\$ 27500.00

Section D: Declaration

This form has a declaration where you say the information in it is correct and complete. Please review the information before you sign the declaration. If you provide false or misleading information, or fail to take reasonable care, you may be liable to administrative penalties imposed by taxation law.

INTENTION TO CLAIM A TAX DEDUCTION

❗ Complete this declaration if you have **not** previously lodged a valid notice with your super fund for these contributions.

I declare that at the time of lodging this notice:

- I intend to claim the personal contributions stated as a tax deduction
- I am a current member of the identified super fund
- the identified super fund currently holds these contributions and has not begun to pay a superannuation income stream based in whole or part on these contributions
- I have not included any of the contributions in an earlier valid notice.

I declare that I am lodging this notice at the earlier of **either**:

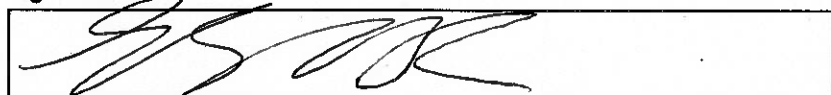
- before the end of the day that I lodged my income tax return for the income year in which the personal contributions were made, or
- before the end of the income year following the year in which the contribution was made.

I declare that the information given on this notice is correct and complete.

Name (Print in BLOCK LETTERS)

ELIZABETH ABEGG

Signature



Date

15/07/21

➤ Send your completed notice to your super fund. **Do not send it to us.** The information on this notice is for you and your super fund. We don't collect this information; we only provide a format for you to provide the information to your super fund.

VARIATION OF PREVIOUS VALID NOTICE OF INTENT

14 Financial year ended 30 June 20

15 My personal contributions to this fund in the above financial year

\$

16 The amount of these personal contributions claimed in my original notice of intent

\$

17 The amount of these personal contributions I will now be claiming as a tax deduction

\$

Declaration

This form has a declaration where you sign to indicate that the information in it is correct and complete. Please review the information before you sign the declaration. If you provide false or misleading information, or fail to take reasonable care, you may be liable to administrative penalties imposed by taxation law.

- 1 Complete this declaration if you have already lodged a valid notice with your fund for these contributions and you wish to reduce the amount stated in that notice.

VARIATION OF PREVIOUS VALID NOTICE OF INTENT

I declare that at the time of lodging this notice:

- ☐ I intend to claim the personal contributions stated as a tax deduction
- ☐ I am a current member of the identified super fund
- ☐ the identified super fund currently holds these contributions and has not begun to pay a superannuation income stream based in whole or part on these contributions.

I declare that I wish to vary my previous valid notice for these contributions by reducing the amount I advised in my previous notice and I confirm that either:

- ☐ I have lodged my income tax return for the year in which the contribution was made, prior to the end of the following income year, and this variation notice is being lodged before the end of the day on which the return was lodged, or

- ☐ I have not yet lodged my income tax return for the relevant year and this variation notice is being lodged on or before 30 June in the financial year following the year in which the personal contributions were made, or
- ☐ the ATO has disallowed my claim for a deduction for the relevant year and this notice reduces the amount stated in my previous valid notice by the amount that has been disallowed.

I declare that the information given on this notice is correct and complete.

Name (Print in BLOCK LETTERS)

Signature

Date

- 2 Send your completed variation notice to your super fund. **Do not send it to us.** The information on this notice is for you and your super fund. We don't collect this information; we only provide a format for you to provide the information to your super fund.

Notice of intent to claim or vary a deduction for personal super contributions

Section A: Your details

1 Tax file number (TFN)

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2 Name

Title:

Family name

ABEGG

First given name

JOHN

Other given names

3 Date of birth

PROVIDED

4 Current postal address

79 ARMSTRONG LANE

Suburb/town/locality

BROKEN HEAD

State/territory

NSW

(Australia only)

Postcode

2481

(Australia only)

Country if outside of Australia

5 Daytime phone number (include area code)

Section B: Super fund's details

6 Fund name

ABEGG FAMILY SUPERANNUATION FUND

7 Fund Australian business number (ABN)

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8 Member account number

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Yes ☐

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INTENTION TO CLAIM A TAX DEDUCTION

1 Complete this declaration if you have **not** previously lodged a valid notice with your super fund for these contributions.

I declare that at the time of lodging this notice:

☐ I intend to claim the personal contributions stated as a tax deduction

☐ I am a current member of the identified super fund

☐ the identified super fund currently holds these contributions and has not begun to pay a superannuation income stream based in whole or part on these contributions

☐ I have not included any of the contributions in an earlier valid notice.

I declare that I am lodging this notice at the earlier of **either**:

☐ before the end of the day that I lodged my income tax return for the income year in which the personal contributions were made, **or**

☐ before the end of the income year following the year in which the contribution was made.

I declare that the information given on this notice is correct and complete.

Name (Print in BLOCK LETTERS)

JOHN ABEGG

Signature



Date

15/7/21

2 Send your completed notice to your super fund. **Do not send it to us.** The information on this notice is for you and your super fund. We don't collect this information; we only provide a format for you to provide the information to your super fund.

VARIATION OF PREVIOUS VALID NOTICE OF INTENT

14 Financial year ended 30 June 20

15 My personal contributions to this fund in the above financial year

\$

16 The amount of these personal contributions claimed in my original notice of intent

\$

17 The amount of these personal contributions I will now be claiming as a tax deduction

\$

Declaration

This form has a declaration where you sign to indicate that the information in it is correct and complete. Please review the information before you sign the declaration. If you provide false or misleading information, or fail to take reasonable care, you may be liable to administrative penalties imposed by taxation law.

! Complete this declaration if you have already lodged a valid notice with your fund for these contributions and you wish to **reduce** the amount stated in that notice.

VARIATION OF PREVIOUS VALID NOTICE OF INTENT

I declare that at the time of lodging this notice:

- ☐ I intend to claim the personal contributions stated as a tax deduction
- ☐ I am a current member of the identified super fund
- ☐ the identified super fund currently holds these contributions and has not begun to pay a superannuation income stream based in whole or part on these contributions.

*I declare that I wish to vary my previous valid notice for these contributions by **reducing** the amount I advised in my previous notice and I confirm that either:*

- ☐ I have lodged my income tax return for the year in which the contribution was made, prior to the end of the following income year, and this variation notice is being lodged before the end of the day on which the return was lodged, **or**

- ☐ I have not yet lodged my income tax return for the relevant year and this variation notice is being lodged on or before 30 June in the financial year following the year in which the personal contributions were made, **or**
- ☐ the ATO has disallowed my claim for a deduction for the relevant year and this notice reduces the amount stated in my previous valid notice by the amount that has been disallowed.

I declare that the information given on this notice is correct and complete.

Name (Print in BLOCK LETTERS)

Signature

Date

> Send your completed variation notice to your super fund. **Do not send it to us.** The information on this notice is for you and your super fund. We don't collect this information; we only provide a format for you to provide the information to your super fund.