



**Australian Government**  
**Australian Taxation Office**

**Agent** STIRLING WARTON TAYLOR PTY  
LIMITED

**Client** NADA BURKE

**TFN** 152624497

## Carry-forward concessional contributions

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If the annual concessional contributions cap for the current year is exceeded, unused concessional contributions may be carried forward if the [eligibility criteria](#) is met.

The eligibility criteria to carry forward the unused concessional contributions has been met as the total superannuation balance is less than **\$500,000.00** at the end of 30 June of the previous financial year. Additional catch-up concessional contributions to the super fund(s) may be made.

The decisions that are made with this information can have tax consequences. We recommend that financial advice is obtained.

### **Total superannuation balance at 30 June 2020**

\$201,706.00

Visit [total superannuation balance](#) to learn more.

Financial year

 

Current as at **19 December 2021**

**Unused concessional contributions available to carry forward** Eligible**\$27,650.48**

**Eligible** to carry forward unused concessional contributions cap because the total superannuation balance is less than **\$500,000.00** at the end of 30 June 2020.

## 2020-21 financial year

Description	Amount
Total carry-forward concessional contributions cap	\$50,000.00
Concessional contributions	\$22,349.52
<b>Unused concessional contributions cap available to carry forward</b>	<b>\$27,650.48</b>

## Previous financial years

Financial year	Concessional contributions cap	Concessional contributions	Unused concessional contributions cap
01/07/2019 - 30/06/2020	\$25,000.00	\$11,197.55	\$13,802.45
01/07/2018 - 30/06/2019	\$25,000.00	\$11,151.97	\$13,848.03

**Further considerations**

- > Concessional contributions may not be reported until 31 October for members of a defined benefit fund.
- > Concessional contributions made to a self-managed fund will not be displayed until we have received and processed the annual return.
- > Concessional contributions will affect additional tax on contributions under [Division 293](#).
- > Refer to previous records or contact the fund (or funds) after 31 October to obtain more up-to-date information.