

**New Line Management Superannuation Fund**  
**Contribution Caps**  
**For the Period From 1 July 2020 to 30 June 2021**

**Mr Stuart Arthur**

**Date of Birth:** 1 Nov 1971  
**Age:** 49 (at 30/06/2021)  
**Status:** Member may be eligible for the bring forward rule, certain conditions apply

**Contributions Summary**

		<b>Concessional</b>	<b>Non-Concessional</b>
<b>Prior Year Contributions</b>			
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
<b>Current Year Contributions</b>			
	<b>Note</b>	<b>Concessional</b>	<b>Non-Concessional</b>
Caps	1	25,000.00	100,000.00
Cumulative Available Unused Cap	2	15,495.11	0.00
Contributions made (to this fund)	3	12,276.88	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		12,276.88	0.00
Amount above caps	4	0.00	0.00
Available		28,218.23	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>
<b>Concessional</b>	Employer	12,276.88
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	<b>Contributions as allocated</b>	<b>12,276.88</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 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
	<b>Total Other contributions</b>	<b>0.00</b>

**Transactions**

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
01/07/2020	Employer Mandated	876.92			smsfdataflow
06/08/2020	Employer Mandated	1,096.15			smsfdataflow
01/09/2020	Employer Mandated	876.92			smsfdataflow
30/09/2020	Employer Mandated	876.92			smsfdataflow
04/11/2020	Employer Mandated	1,096.15			smsfdataflow
01/12/2020	Employer Mandated	876.92			smsfdataflow
07/01/2021	Employer Mandated	1,096.15			smsfdataflow
02/02/2021	Employer Mandated	876.92			smsfdataflow

---

**New Line Management Superannuation Fund**  
**Contribution Caps**  
**For the Period From 1 July 2020 to 30 June 2021**

---

**Mr Stuart Arthur**

<b>Date</b>	<b>Contribution Type</b>	<b>Concessional</b>	<b>Non-Concessional</b>	<b>Other</b>	<b>Source</b>
03/03/2021	Employer Mandated	876.92			smsfdataflow
06/04/2021	Employer Mandated	876.92			smsfdataflow
05/05/2021	Employer Mandated	1,096.15			smsfdataflow
02/06/2021	Employer Mandated	876.92			manual
24/06/2021	Employer Mandated	876.92			smsfdataflow
	<b>Totals:</b>	<b>12,276.88</b>			

**New Line Management Superannuation Fund**  
**Contribution Caps**  
**For the Period From 1 July 2020 to 30 June 2021**

**Mrs Roslyn Arthur**

**Date of Birth:** 21 Apr 1942  
**Age:** 79 (at 30/06/2021)  
**Status:** Generally no contributions allowed, some exceptions apply

**Contributions Summary**

**Non-Concessional**

**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

N/A  
 N/A

**Current Year Contributions**

	<b>Note</b>	<b>Concessional</b>	<b>Non-Concessional</b>
Caps	1,2	25,000.00	0.00
Cumulative Available Unused Cap	3	0.00	0.00
Contributions made (to this fund)	4	3,087.50	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		3,087.50	0.00
Amount above caps	5	0.00	0.00
Available		21,912.50	0.00

**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 2020, 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	3,087.50
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	<b>Contributions as allocated</b>	<b>3,087.50</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 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
	<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>
03/08/2020	Employer Mandated	308.75			smsfdataflow
27/08/2020	Employer Mandated	308.75			smsfdataflow
24/09/2020	Employer Mandated	308.75			smsfdataflow
21/10/2020	Employer Mandated	308.75			smsfdataflow
23/11/2020	Employer Mandated	308.75			smsfdataflow
06/01/2021	Employer Mandated	308.75			smsfdataflow

---

**New Line Management Superannuation Fund  
Contribution Caps  
For the Period From 1 July 2020 to 30 June 2021**

---

**Mrs Roslyn Arthur**

<b>Date</b>	<b>Contribution Type</b>	<b>Concessional</b>	<b>Non-Concessional</b>	<b>Other</b>	<b>Source</b>
25/01/2021	Employer Mandated	308.75			smsfdataflow
18/02/2021	Employer Mandated	308.75			smsfdataflow
29/03/2021	Employer Mandated	308.75			smsfdataflow
27/05/2021	Employer Mandated	308.75			smsfdataflow
	<b>Totals:</b>	<b>3,087.50</b>			