

Contribution Caps

For the Period From 1 July 2021 to 30 June 2022

Mr Donald Robertson

Date of Birth: 4 Jul 1950

Age: 71 (at 30/06/2022)

Status: Only employer or personal contributions allowed subject to the work test

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

N/A

Total non-concessional contributions in previous 2 years

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	350.00	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		350.00	0.00
Amount above caps	5	0.00	0.00
Available		27,150.00	110,000.00

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	350.00
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	350.00
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
16/12/2021	Employer Mandated	50.00			manual
14/02/2022	Employer Mandated	100.00			manual
12/05/2022	Employer Mandated	200.00			manual
Totals:		350.00	A		