

Levey Superannuation Fund
Contribution Caps
For the Period From 1 July 2019 to 30 June 2020

Mr Andrew Levey

Date of Birth: 26 Feb 1971
Age: 49 (at 30/06/2020)
Status: Member may be eligible for the bring forward rule, certain conditions apply

Contributions Summary

Prior Year Contributions

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

Current Year Contributions	Note	Concessional	Non-Concessional
Caps	1	25,000.00	100,000.00
Cumulative Available Unused Cap	2	0.00	0.00
Contributions made (to this fund)	3	19,170.83	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		19,170.83	0.00
Amount above caps	4	0.00	0.00
Available		5,829.17	100,000.00

Notes

- 1 . Non-concessional cap shown does NOT take prior year 'Bring Forward Rule' usage into account
- 2 . Total Superannuation Balance was \$500,000 or more at 30 June 2019, member not 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>
Concessional	Employer	19,170.83
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	19,170.83
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 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
	Total Other contributions	0.00

Transactions

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
01/07/2019	Employer Voluntary	5,000.00			manual
05/08/2019	Employer Mandated	1,108.33			smsfdataflow
23/08/2019	Employer Mandated	1,187.50			smsfdataflow
20/09/2019	Employer Mandated	1,187.50			smsfdataflow
01/11/2019	Employer Mandated	1,187.50			smsfdataflow
03/12/2019	Employer Mandated	1,187.50			smsfdataflow
14/01/2020	Employer Mandated	1,187.50			smsfdataflow

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Date	Contribution Type	Concessional	Non-Concessional	Other	Source
03/02/2020	Employer Mandated	1,187.50			smsfdataflow
21/02/2020	Employer Mandated	1,187.50			smsfdataflow
23/03/2020	Employer Mandated	1,187.50			smsfdataflow
08/05/2020	Employer Mandated	1,187.50			smsfdataflow
25/05/2020	Employer Mandated	1,187.50			smsfdataflow
25/06/2020	Employer Mandated	1,187.50			smsfdataflow
Totals:		19,170.83			

Levey Superannuation Fund
Contribution Caps
For the Period From 1 July 2019 to 30 June 2020

Mrs Tina Levey

Date of Birth: 4 Jul 1969
Age: 50 (at 30/06/2020)
Status: Member may be eligible for the bring forward rule, certain conditions apply

Contributions Summary

Prior Year Contributions
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

Current Year Contributions	Note	Concessional	Non-Concessional
Caps	1	25,000.00	100,000.00
Cumulative Available Unused Cap	2	19,153.39	0.00
Contributions made (to this fund)	3	12,488.31	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		12,488.31	0.00
Amount above caps	4	0.00	0.00
Available		31,665.08	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>
Concessional	Employer	12,488.31
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	12,488.31
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 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
	Total Other contributions	0.00

Transactions

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
01/07/2019	Employer Voluntary	5,000.00			manual
09/07/2019	Employer Mandated	197.60			smsfdataflow
05/08/2019	Employer Mandated	395.83			smsfdataflow
09/08/2019	Employer Mandated	197.60			smsfdataflow
23/08/2019	Employer Mandated	395.83			smsfdataflow
07/09/2019	Employer Mandated	219.83			smsfdataflow
20/09/2019	Employer Mandated	395.83			smsfdataflow
09/10/2019	Employer Mandated	197.60			smsfdataflow

Levey Superannuation Fund
Contribution Caps
For the Period From 1 July 2019 to 30 June 2020

Mrs Tina Levey

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
01/11/2019	Employer Mandated	395.83			smsfdataflow
09/11/2019	Employer Mandated	299.56			smsfdataflow
03/12/2019	Employer Mandated	395.83			smsfdataflow
07/12/2019	Employer Mandated	200.76			smsfdataflow
09/01/2020	Employer Mandated	220.84			smsfdataflow
14/01/2020	Employer Mandated	395.83			smsfdataflow
03/02/2020	Employer Mandated	395.83			smsfdataflow
08/02/2020	Employer Mandated	240.91			smsfdataflow
21/02/2020	Employer Mandated	395.83			smsfdataflow
07/03/2020	Employer Mandated	200.76			smsfdataflow
23/03/2020	Employer Mandated	395.83			smsfdataflow
09/04/2020	Employer Mandated	361.37			smsfdataflow
08/05/2020	Employer Mandated	395.83			smsfdataflow
09/05/2020	Employer Mandated	200.76			smsfdataflow
25/05/2020	Employer Mandated	395.83			smsfdataflow
10/06/2020	Employer Mandated	200.76			smsfdataflow
25/06/2020	Employer Mandated	395.83			smsfdataflow
Totals:		12,488.31			