

**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**

**Non-Concessional**

**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>
<b>Concessional</b>	Employer	19,170.83
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	<b>Contributions as allocated</b>	<b>19,170.83</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
01/07/2019	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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<b>Date</b>	<b>Contribution Type</b>	<b>Concessional</b>	<b>Non-Concessional</b>	<b>Other</b>	<b>Source</b>
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
<b>Totals:</b>		<b>19,170.83</b>			

**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**

**Non-Concessional**

**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>
<b>Concessional</b>	Employer	12,488.31
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	<b>Contributions as allocated</b>	<b>12,488.31</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
01/07/2019	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

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**Levey Superannuation Fund**  
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**Mrs Tina Levey**

<b>Date</b>	<b>Contribution Type</b>	<b>Concessional</b>	<b>Non-Concessional</b>	<b>Other</b>	<b>Source</b>
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
<b>Totals:</b>		<b>12,488.31</b>			