

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

Mr James Ragen

Date of Birth: 11 Apr 1974
Age: 46 (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	28,294.26	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		25,000.00	3,294.26
Amount above caps	4	3,294.26	0.00
Available		0.00	96,705.74

Notes

- 1 . Non-concessional cap shown does NOT take prior year 'Bring Forward Rule' usage into account
- 2 . Concessional contribution cap has been used up in prior year(s), member has no unused concessional contribution cap carry forward
- 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	28,294.26
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Total	28,294.26
	Less excess Concessional treated as Non-Concessional	(3,294.26)
NonConcessional	Contributions as allocated	25,000.00
	Personal	0.00
	Spouse	0.00
	Child	0.00
	Transfers from reserve	0.00
	Foreign superannuation fund	0.00
	Total	0.00
Other	Plus excess Concessional treated as Non-Concessional	(3,294.26)
	Contributions as allocated	3,294.26
	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
31/07/2019	Employer Mandated	2,375.00			smsfdataflow
23/08/2019	Employer Mandated	2,230.12			smsfdataflow
01/10/2019	Employer Mandated	2,201.05			smsfdataflow

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Date	Contribution Type	Concessional	Non-Concessional	Other	Source
28/10/2019	Employer Mandated	2,375.00			smsfdataflow
28/11/2019	Employer Mandated	1,972.00			smsfdataflow
30/12/2019	Employer Mandated	2,375.00			smsfdataflow
23/01/2020	Employer Mandated	2,375.00			smsfdataflow
26/02/2020	Employer Mandated	1,768.75			smsfdataflow
30/03/2020	Employer Mandated	3,703.08			smsfdataflow
28/04/2020	Employer Mandated	2,755.90			smsfdataflow
27/05/2020	Employer Mandated	2,141.91			smsfdataflow
19/06/2020	Employer Mandated	2,021.45			smsfdataflow
Totals:		28,294.26			

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

Mrs Paula Ragen

Date of Birth: 26 Jul 1976

Age: 43 (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	25,000.00	0.00
Contributions made (to this fund)	3	0.00	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		0.00	0.00
Amount above caps	4	0.00	0.00
Available		50,000.00	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