

DONALDSON, MARK Add to favourites ☆
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 Business >
 TFN  ABN  53 164 987 569

Total superannuation balance

Important

- > All data is based on information reported to us by your client, or their super-funds, and processed through our systems.
- > Decisions made with this information can have tax consequences for your client. Your clients can refer to their own records or contact their funds to obtain up-to-date information.

Your client's total superannuation balance²² is used to determine their eligibility to make contributions, receive co-contributions, and their spouse's eligibility to claim a tax offset for spouse contributions they make. For your clients who are members of a self-managed super fund, or small APRA fund, the trustee of the fund will also use their members' total superannuation balance to determine whether the segregated assets method can be used to calculate exempt current pension income.

Total superannuation balance as at 30/06/2019
\$136,694.08

Current	History
Total superannuation balance details for previous financial years.	
Financial year 2018 - 2019	
Type	Amount
Accumulation phase	\$136,694.08 CR
DONALDSON, MARK	
TFN	ABN
482 432 806	53 164 987 559
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Carry forward concessional contributions

Decisions made with this information can have tax consequences.

The contributions data that appears on this screen has been reported to us by your client's super fund (or funds), and we have determined them to be concessional contributions.

Your client's total superannuation balance affects their unused concessional contributions cap. If

Financial year

① Your client has unused concessional contributions cap. Check if they are eligible.

Total carry forward concessional contributions cap	\$25,000.00
Concessional contributions counting towards your client's cap	\$0.00
Unused concessional contributions cap available to carry forward	\$25,000.00

Liberty Developments (Qld) Pty Ltd

Super Contributions Report

Date Generated User Report Period Filters
 2/06/2021 11:38 AM Elizabeth Druce (473623) 1/07/2019 - 30/06/2020 Location: All, Pay Schedule: All

Super contributions report			
All			\$3,336.59
Liberty Developments (Qld) Pty Ltd			\$3,336.59
Mark Donaldson			\$3,336.59
Super accrued			\$3,336.59
Date	Contribution type	Amount	
5/03/2020	Super Guarantee	\$196.27	
12/03/2020	Super Guarantee	\$196.27	
19/03/2020	Super Guarantee	\$196.27	
26/03/2020	Super Guarantee	\$196.27	
2/04/2020	Super Guarantee	\$196.27	
9/04/2020	Super Guarantee	\$196.27	
16/04/2020	Super Guarantee	\$196.27	
23/04/2020	Super Guarantee	\$196.27	
30/04/2020	Super Guarantee	\$196.27	
7/05/2020	Super Guarantee	\$196.27	
14/05/2020	Super Guarantee	\$196.27	
21/05/2020	Super Guarantee	\$196.27	
28/05/2020	Super Guarantee	\$196.27	
4/06/2020	Super Guarantee	\$196.27	
11/06/2020	Super Guarantee	\$196.27	
18/06/2020	Super Guarantee	\$196.27	
25/06/2020	Super Guarantee	\$196.27	
Super payments			\$3,336.59
Super fund	Member number	Payment type	Amount
Donaldson Superannuation Fund (92632761244)	1	Super Guarantee	\$3,336.59



Contributions Dashboard

Financial Year

2019 / 2020



Donaldson, Mark

PY & External Contributions

\$ 18,433.41

BELOW CAP
Concessional

\$ 100,000.00

BELOW CAP
Non-Concessional

Contribution Caps

* Total Super Balance as at 30/06/2019. The amount is per individual across all funds.

Member	Contribution Type	Contributions	Cap	Current Position
Donaldson, Mark 02/01/1958 - 61 at 30/06/2019	Concessional (5 year Carry Forward Cap available)	31,566.59	50,000.00	\$ 18,433.41 BELOW CAP
Total Super Balance: 136,694.08	Non-Concessional	0.00	100,000.00	\$ 100,000.00 BELOW CAP

Carry Forward Unused Concessional Contribution Cap

Member		2015	2016	2017	2018	2019	2020	Current Position
Donaldson, Mark Expand	Concessional Contribution Cap	N/A	N/A	35,000.00	25,000.00	25,000.00	25,000.00	
	Cumulative Carry Forward Unused	N/A	N/A	N/A	N/A	0.00	25,000.00	
	Maximum Cap Available	N/A	N/A	35,000.00	25,000.00	25,000.00	50,000.00	\$ 18,433.41 BELOW CAP

Non-Concessional Bring Forward Cap

Member	Bring Forward Cap	2017	2018	2019	2020	NCC Bring Forward Total	Current Position
Donaldson, Mark	N/A	0.00	0.00	3,171.00	0.00	N/A	Bring Forward Not Triggered