

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

Mr Donald Robertson

Date of Birth: 4 Jul 1950
Age: 69 (at 30/06/2020)
Status: Member must meet work test criteria, other conditions apply

Contributions Summary

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	25,000.00	100,000.00
Cumulative Available Unused Cap	3	0.00	0.00
Contributions made (to this fund)	4	2,850.00	100,000.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		2,850.00	100,000.00
Amount above caps	5	0.00	0.00
Available		22,150.00	0.00

Notes

- 1 . 'Bring Forward Rule' can NOT be triggered this year; member was 65 or older
- 2 . Non-concessional cap shown applies to current year only
- 3 . Total Superannuation Balance was \$500,000 or more at 30 June 2019, member not eligible to make catch-up concessional contributions
- 4 . Excludes any unmatched deposits
- 5 . Any excess concessional contributions are treated as non-concessional

Contributions Breakdown

<u>Income Type</u>	<u>Contribution Type</u>	<u>Amount</u>
Concessional	Employer	2,850.00
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	2,850.00
NonConcessional	Personal	100,000.00
	Spouse	0.00
	Child	0.00
	Transfers from reserve	0.00
	Foreign superannuation fund	0.00
	Contributions as allocated	100,000.00
Other	CGT small business 15-year exception	0.00
	CGT small business retirement exemption	0.00
	Government Co-Contributions	480.00
	Directed termination payment (taxed)	0.00
	Directed termination payment (untaxed)	0.00
	Personal injury election	0.00
	Downsizer Contribution	0.00
	Total Other contributions	480.00

Transactions

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
08/07/2019	Employer Mandated	150.00			manual
22/08/2019	Employer Mandated	150.00			manual
22/08/2019	Employer Mandated	200.00			manual
23/09/2019	Employer Mandated	200.00			manual
30/09/2019	Employer Mandated	150.00			manual
01/10/2019	Employer Mandated	200.00			manual

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11/11/2019	Employer Mandated	150.00			manual
14/11/2019	Employer Mandated	200.00			manual
19/12/2019	Employer Mandated	150.00			manual
19/12/2019	Employer Mandated	200.00			manual
02/01/2020	Employer Mandated	200.00			manual
18/02/2020	Employer Mandated	200.00			manual
02/03/2020	Employer Mandated	150.00			manual
19/03/2020	Employer Mandated	200.00			manual
23/03/2020	Employer Mandated	150.00			manual
26/03/2020	Employer Mandated	200.00			manual
26/03/2020	Government Co-Contributions			480.00	manual
30/03/2020	Personal		50,000.00		manual
07/04/2020	Personal		50,000.00		manual
Totals:		2,850.00	100,000.00	480.00	