

Waddell Family Superannuation Fund
Contribution Caps
For the Period From 1 July 2020 to 30 June 2021

Mr Leonard Waddell

Date of Birth: 23 Mar 1946
Age: 75 (at 30/06/2021)
Status: Member is eligible to contribute up to their birth day, other conditions apply

Contributions Summary

Non-Concessional

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
Total non-concessional contributions in previous 2 years

N/A
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	0.00	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		0.00	0.00
Amount above caps	5	0.00	0.00
Available		25,000.00	100,000.00

Notes

- 1 . 'Bring Forward Rule' can NOT be triggered this year; member was 67 or older
- 2 . Non-concessional cap shown applies to current year only
- 3 . Total Superannuation Balance was \$500,000 or more at 30 June 2020, member not eligible to make catch-up concessional contributions
- 4 . Excludes any unmatched deposits
- 5 . Any excess concessional contributions are treated as non-concessional

Waddell Family Superannuation Fund
Contribution Caps
For the Period From 1 July 2020 to 30 June 2021

Mrs Lesley Waddell

Date of Birth: 12 Apr 1947
Age: 74 (at 30/06/2021)
Status: Only employer or personal contributions allowed subject to the work test

Contributions Summary

Non-Concessional

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
Total non-concessional contributions in previous 2 years

N/A
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	0.00	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		0.00	0.00
Amount above caps	5	0.00	0.00
Available		25,000.00	100,000.00

Notes

- 1 . 'Bring Forward Rule' can NOT be triggered this year; member was 67 or older
- 2 . Non-concessional cap shown applies to current year only
- 3 . Total Superannuation Balance was \$500,000 or more at 30 June 2020, member not eligible to make catch-up concessional contributions
- 4 . Excludes any unmatched deposits
- 5 . Any excess concessional contributions are treated as non-concessional

Waddell Family Superannuation Fund
Contribution Caps
For the Period From 1 July 2020 to 30 June 2021

Ms Claire Waddell

Date of Birth: 1 Jun 1975
Age: 46 (at 30/06/2021)
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	50,000.00	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		75,000.00	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

Waddell Family Superannuation Fund
Contribution Caps
For the Period From 1 July 2020 to 30 June 2021

Ms Vanessa Waddell

Date of Birth: 27 Nov 1971
Age: 49 (at 30/06/2021)
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	50,000.00	0.00
Contributions made (to this fund)	3	6,600.00	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		6,600.00	0.00
Amount above caps	4	0.00	0.00
Available		68,400.00	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

Contributions Breakdown

<u>Income Type</u>	<u>Contribution Type</u>	<u>Amount</u>
Concessional	Employer	6,600.00
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	6,600.00
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
04/09/2020	Employer Voluntary	300.00			smsfdataflow
07/10/2020	Employer Voluntary	600.00			smsfdataflow
04/11/2020	Employer Voluntary	600.00			smsfdataflow
19/11/2020	Employer Voluntary	900.00			smsfdataflow
18/12/2020	Employer Voluntary	600.00			smsfdataflow
20/01/2021	Employer Voluntary	600.00			smsfdataflow
19/02/2021	Employer Voluntary	600.00			smsfdataflow
18/03/2021	Employer Mandated	600.00			manual

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Ms Vanessa Waddell

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
22/04/2021	Employer Voluntary	600.00			smsfdataflow
20/05/2021	Employer Voluntary	600.00			smsfdataflow
21/06/2021	Employer Voluntary	600.00			smsfdataflow
Totals:		6,600.00			