

Levey Superannuation Fund
Contribution Caps
For the Period From 1 July 2018 to 30 June 2019

Mr Andrew Levey

Date of Birth: 26 Feb 1971
Age: 48 (at 30/06/2019)
Status: Member may be eligible for the bring forward rule, certain conditions apply

Contributions Summary

Prior Year Contributions

Contributions for the previous 2 years are not confirmed
3-year cap in effect from previous years
Total non-concessional contributions in previous 2 years

Non-Concessional

Unknown

Unknown

| Current Year Contributions | Note | Concessional | Non-Concessional |
|-------------------------------------|-------------|---------------------|-------------------------|
| Caps | 1, 2 | 25,000.00 | 100,000.00 |
| Contributions made (to this fund) | 3 | 12,191.63 | 0.00 |
| Contributions made (to other funds) | | 0.00 | 0.00 |
| Contributions as allocated | | 12,191.63 | 0.00 |
| Amount above caps | 4 | 0.00 | 0.00 |
| Available | | 12,808.37 | 100,000.00 |

Notes

1. 'Bring Forward Rule' MAY be triggered this year
2. Non-concessional cap shown does NOT take prior year 'Bring Forward Rule' usage into account
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 | 12,191.63 |
| | Personal | 0.00 |
| | Family and friends | 0.00 |
| | Foreign superannuation fund | 0.00 |
| | Transfers from reserve | 0.00 |
| | Contributions as allocated | 12,191.63 |
| 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 |
|-------------|--------------------------|---------------------|-------------------------|--------------|---------------|
| 14/08/2018 | Employer Mandated | 1,108.33 | | | smsfdataflow |
| 24/09/2018 | Employer Mandated | 1,108.33 | | | smsfdataflow |
| 26/10/2018 | Employer Mandated | 1,108.33 | | | smsfdataflow |
| 16/11/2018 | Employer Mandated | 1,108.33 | | | smsfdataflow |
| 04/01/2019 | Employer Mandated | 1,108.33 | | | smsfdataflow |
| 05/02/2019 | Employer Mandated | 1,108.33 | | | smsfdataflow |
| 22/02/2019 | Employer Mandated | 1,108.33 | | | smsfdataflow |
| 14/03/2019 | Employer Mandated | 1,108.33 | | | smsfdataflow |

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Mr Andrew Levey

| Date | Contribution Type | Concessional | Non-Concessional | Other | Source |
|----------------|--------------------------|---------------------|-------------------------|--------------|---------------|
| 02/05/2019 | Employer Mandated | 1,108.33 | | | smsfdataflow |
| 21/05/2019 | Employer Mandated | 1,108.33 | | | smsfdataflow |
| 27/06/2019 | Employer Mandated | 1,108.33 | | | smsfdataflow |
| Totals: | | 12,191.63 | | | |

Levey Superannuation Fund
Contribution Caps
For the Period From 1 July 2018 to 30 June 2019

Mrs Tina Levey

Date of Birth: 4 Jul 1969
Age: 49 (at 30/06/2019)
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, 2 | 25,000.00 | 100,000.00 |
| Contributions made (to this fund) | 3 | 5,846.61 | 0.00 |
| Contributions made (to other funds) | | 0.00 | 0.00 |
| Contributions as allocated | | 5,846.61 | 0.00 |
| Amount above caps | 4 | 0.00 | 0.00 |
| Available | | 19,153.39 | 100,000.00 |

Notes

1. 'Bring Forward Rule' MAY be triggered this year
2. Non-concessional cap shown does NOT take prior year 'Bring Forward Rule' usage into account
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 | 5,846.61 |
| | Personal | 0.00 |
| | Family and friends | 0.00 |
| | Foreign superannuation fund | 0.00 |
| | Transfers from reserve | 0.00 |
| | Contributions as allocated | 5,846.61 |
| 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 |
|------------|-------------------|--------------|------------------|-------|--------------|
| 14/08/2018 | Employer Mandated | 395.83 | | | smsfdataflow |
| 24/09/2018 | Employer Mandated | 395.83 | | | smsfdataflow |
| 26/10/2018 | Employer Mandated | 395.83 | | | smsfdataflow |
| 16/11/2018 | Employer Mandated | 395.83 | | | smsfdataflow |
| 04/01/2019 | Employer Mandated | 395.83 | | | smsfdataflow |
| 17/01/2019 | Employer Mandated | 96.63 | | | manual |
| 05/02/2019 | Employer Mandated | 395.83 | | | smsfdataflow |
| 22/02/2019 | Employer Mandated | 395.83 | | | smsfdataflow |

Levey Superannuation Fund
Contribution Caps
For the Period From 1 July 2018 to 30 June 2019

Mrs Tina Levey

| Date | Contribution Type | Concessional | Non-Concessional | Other | Source |
|----------------|--------------------------|---------------------|-------------------------|--------------|---------------|
| 14/03/2019 | Employer Mandated | 395.83 | | | smsfdataflow |
| 26/03/2019 | Employer Mandated | 57.31 | | | manual |
| 29/03/2019 | Employer Mandated | 358.09 | | | manual |
| 02/05/2019 | Employer Mandated | 395.83 | | | smsfdataflow |
| 08/05/2019 | Employer Mandated | 199.93 | | | manual |
| 09/05/2019 | Employer Mandated | 533.52 | | | smsfdataflow |
| 21/05/2019 | Employer Mandated | 395.83 | | | smsfdataflow |
| 07/06/2019 | Employer Mandated | 49.40 | | | smsfdataflow |
| 08/06/2019 | Employer Mandated | 197.60 | | | smsfdataflow |
| 27/06/2019 | Employer Mandated | 395.83 | | | smsfdataflow |
| Totals: | | 5,846.61 | | | |