

**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**

		Non-Concessional	
<b>Prior Year Contributions</b>			
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	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>
<b>Concessional</b>	Employer	12,191.63
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	<b>Contributions as allocated</b>	<b>12,191.63</b>
<b>NonConcessional</b>	Personal	0.00
	Spouse	0.00
	Child	0.00
	Transfers from reserve	0.00
	Foreign superannuation fund	0.00
	<b>Contributions as allocated</b>	<b>0.00</b>
<b>Other</b>	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
	<b>Total Other contributions</b>	<b>0.00</b>

**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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<b>Date</b>	<b>Contribution Type</b>	<b>Concessional</b>	<b>Non-Concessional</b>	<b>Other</b>	<b>Source</b>
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
	<b>Totals:</b>	<b>12,191.63</b>			

**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	
<b>Prior Year Contributions</b>			
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>
<b>Concessional</b>	Employer	5,846.61
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	<b>Contributions as allocated</b>	<b>5,846.61</b>
<b>NonConcessional</b>	Personal	0.00
	Spouse	0.00
	Child	0.00
	Transfers from reserve	0.00
	Foreign superannuation fund	0.00
	<b>Contributions as allocated</b>	<b>0.00</b>
<b>Other</b>	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
	<b>Total Other contributions</b>	<b>0.00</b>

**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

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**Mrs Tina Levey**

<b>Date</b>	<b>Contribution Type</b>	<b>Concessional</b>	<b>Non-Concessional</b>	<b>Other</b>	<b>Source</b>
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
<b>Totals:</b>		<b>5,846.61</b>			