

Leighton Kesteven Superannuation Fund No 1
Contribution Caps
For the Period From 1 July 2019 to 30 June 2020

Mr Scott Smith

Date of Birth: 6 Dec 1953
Age: 66 (at 30/06/2020)
Status: Member must meet work test criteria, other conditions apply

Contributions Summary

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	0.00	0.00
Contributions made (to this fund)	3	20,660.00	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		20,660.00	0.00
Amount above caps	4	0.00	0.00
Available		4,340.00	100,000.00

Notes

- 1 . Non-concessional cap shown does NOT take prior year 'Bring Forward Rule' usage into account
- 2 . Total Superannuation Balance was \$500,000 or more at 30 June 2019, member not 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	20,660.00
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	20,660.00
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	11,900.00
	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	11,900.00

Transactions

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
26/07/2019	Employer Mandated	660.00			manual
25/10/2019	CGT small business retirement exemption			500.00	manual
01/11/2019	CGT small business retirement exemption			500.00	manual
08/11/2019	CGT small business retirement exemption			500.00	manual
15/11/2019	CGT small business retirement exemption			500.00	manual

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Date	Contribution Type	Concessional	Non-Concessional	Other	Source
22/11/2019	CGT small business retirement exemption			500.00	manual
29/11/2019	CGT small business retirement exemption			500.00	manual
06/12/2019	CGT small business retirement exemption			500.00	manual
13/12/2019	CGT small business retirement exemption			500.00	manual
20/12/2019	CGT small business retirement exemption			500.00	manual
27/12/2019	CGT small business retirement exemption			500.00	manual
03/01/2020	CGT small business retirement exemption			500.00	manual
10/01/2020	CGT small business retirement exemption			500.00	manual
17/01/2020	CGT small business retirement exemption			500.00	manual
24/01/2020	CGT small business retirement exemption			500.00	manual
31/01/2020	CGT small business retirement exemption			500.00	manual
07/02/2020	CGT small business retirement exemption			500.00	manual
14/02/2020	CGT small business retirement exemption			500.00	manual
21/02/2020	CGT small business retirement exemption			500.00	manual
21/02/2020	CGT small business retirement exemption			500.00	manual
28/02/2020	CGT small business retirement exemption			500.00	manual
28/02/2020	CGT small business retirement exemption			500.00	manual
06/03/2020	CGT small business retirement exemption			400.00	manual
06/03/2020	CGT small business retirement exemption			500.00	manual
13/03/2020	CGT small business retirement exemption			500.00	manual
22/06/2020	Employer Mandated	10,000.00			manual
25/06/2020	Employer Mandated	10,000.00			manual
Totals:		20,660.00		11,900.00	

Leighton Kesteven Superannuation Fund No 1
Contribution Caps
For the Period From 1 July 2019 to 30 June 2020

Mrs Tomoko Smith

Date of Birth: 27 Feb 1955
Age: 65 (at 30/06/2020)
Status: Member must meet work test criteria, other conditions apply

Contributions Summary

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	0.00	0.00
Contributions made (to this fund)	3	9,000.00	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		9,000.00	0.00
Amount above caps	4	0.00	0.00
Available		16,000.00	100,000.00

Notes

- 1 . Non-concessional cap shown does NOT take prior year 'Bring Forward Rule' usage into account
- 2 . Total Superannuation Balance was \$500,000 or more at 30 June 2019, member not 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	9,000.00
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	9,000.00
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	11,900.00
	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	11,900.00

Transactions

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
18/07/2019	Employer Mandated	4,000.00			manual
25/10/2019	CGT small business retirement exemption			500.00	manual
01/11/2019	CGT small business retirement exemption			500.00	manual
08/11/2019	CGT small business retirement exemption			500.00	manual
15/11/2019	CGT small business retirement exemption			500.00	manual

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Mrs Tomoko Smith

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
22/11/2019	CGT small business retirement exemption			500.00	manual
29/11/2019	CGT small business retirement exemption			500.00	manual
06/12/2019	CGT small business retirement exemption			500.00	manual
13/12/2019	CGT small business retirement exemption			500.00	manual
20/12/2019	CGT small business retirement exemption			500.00	manual
27/12/2019	CGT small business retirement exemption			500.00	manual
03/01/2020	CGT small business retirement exemption			500.00	manual
10/01/2020	CGT small business retirement exemption			500.00	manual
17/01/2020	CGT small business retirement exemption			500.00	manual
24/01/2020	CGT small business retirement exemption			500.00	manual
31/01/2020	CGT small business retirement exemption			500.00	manual
07/02/2020	CGT small business retirement exemption			500.00	manual
14/02/2020	CGT small business retirement exemption			500.00	manual
21/02/2020	CGT small business retirement exemption			500.00	manual
21/02/2020	CGT small business retirement exemption			500.00	manual
28/02/2020	CGT small business retirement exemption			500.00	manual
28/02/2020	CGT small business retirement exemption			500.00	manual
06/03/2020	CGT small business retirement exemption			400.00	manual
06/03/2020	CGT small business retirement exemption			500.00	manual
13/03/2020	CGT small business retirement exemption			500.00	manual
22/06/2020	Employer Mandated	5,000.00			manual
Totals:		9,000.00		11,900.00	