

Darcy Kennedy Service Trust Superannuation Benefit
Contribution Caps
For the Period From 1 July 2020 to 30 June 2021

Mr Michael Kennedy

Date of Birth: 3 Dec 1953
Age: 67 (at 30/06/2021)
Status: Member must meet work test criteria, other 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	0.00	0.00
Contributions made (to this fund)	3	22,490.33	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		22,490.33	0.00
Amount above caps	4	0.00	0.00
Available		2,509.67	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 2020, 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	22,490.33
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	22,490.33
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
08/07/2020	Employer Mandated	97.11			smsfdataflow
10/08/2020	Employer Mandated	291.33			smsfdataflow
20/08/2020	Employer Mandated	856.10			smsfdataflow
20/08/2020	Employer Voluntary	1,560.00			smsfdataflow
08/09/2020	Employer Mandated	194.22			smsfdataflow
21/09/2020	Employer Mandated	616.31			smsfdataflow
21/09/2020	Employer Voluntary	1,035.00			smsfdataflow

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Date	Contribution Type	Concessional	Non-Concessional	Other	Source
08/10/2020	Employer Mandated	194.22			smsfdataflow
15/10/2020	Employer Mandated	643.48			smsfdataflow
15/10/2020	Employer Voluntary	1,030.00			smsfdataflow
09/11/2020	Employer Mandated	194.22			smsfdataflow
08/12/2020	Employer Mandated	291.33			smsfdataflow
17/12/2020	Employer Mandated	643.48			smsfdataflow
17/12/2020	Employer Mandated	643.48			smsfdataflow
17/12/2020	Employer Voluntary	1,030.00			smsfdataflow
17/12/2020	Employer Voluntary	1,030.00			smsfdataflow
08/01/2021	Employer Mandated	194.22			smsfdataflow
08/01/2021	Employer Mandated	965.22			smsfdataflow
08/01/2021	Employer Voluntary	1,545.00			smsfdataflow
08/02/2021	Employer Mandated	194.22			smsfdataflow
15/02/2021	Employer Mandated	643.48			smsfdataflow
15/02/2021	Employer Voluntary	1,030.00			smsfdataflow
08/03/2021	Employer Mandated	194.22			smsfdataflow
12/03/2021	Employer Mandated	643.48			smsfdataflow
12/03/2021	Employer Voluntary	1,030.00			smsfdataflow
08/04/2021	Employer Mandated	194.22			smsfdataflow
26/04/2021	Employer Mandated	643.48			smsfdataflow
26/04/2021	Employer Voluntary	1,030.00			smsfdataflow
10/05/2021	Employer Mandated	194.22			smsfdataflow
17/05/2021	Employer Mandated	643.48			smsfdataflow
17/05/2021	Employer Voluntary	1,030.00			smsfdataflow
08/06/2021	Employer Mandated	291.33			smsfdataflow
15/06/2021	Employer Mandated	643.48			smsfdataflow
15/06/2021	Employer Voluntary	1,030.00			smsfdataflow
Totals:		22,490.33			

Darcy Kennedy Service Trust Superannuation Benefit
Contribution Caps
For the Period From 1 July 2020 to 30 June 2021

Mrs Kaylene Kennedy

Date of Birth: 28 Mar 1954
Age: 67 (at 30/06/2021)
Status: Member must meet work test criteria, other conditions apply

Contributions Summary

Non-Concessional

Prior Year Contributions

The 'Bring Forward Rule' was triggered two years ago	
3-year cap in effect from previous 2 years	300,000.00
Total non-concessional contributions in previous 2 years	300,000.00

Current Year Contributions	Note	Concessional	Non-Concessional
Caps	1,2	25,000.00	0.00
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	0.00

Notes

- 1 . 'Bring Forward Rule' was triggered 2 years ago
- 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