

**Kearland Superannuation Fund**  
**Contribution Caps**  
**For the Period From 1 July 2022 to 30 June 2023**

*Brenda Wishey*

**Mr Charles Kearley**

**Date of Birth:** 09 Apr 1964

**Age:** 59 (at 30/06/2023)

**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

<b>Current Year Contributions</b>	<b>Note</b>	<b>Concessional</b>	<b>Non-Concessional</b>
Caps	1	27,500.00	110,000.00
Cumulative Available Unused Cap	2	102,500.00	0.00
Contributions made (to this fund)	3	25,946.28	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		25,946.28	0.00
Amount above caps	4	0.00	0.00
Available		104,053.72	110,000.00

**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>
<b>Concessional</b>	<b>Employer</b>	<b>946.28</b>
	<b>Personal</b>	<b>25,000.00</b>
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	<b>Contributions as allocated</b>	<b>25,946.28</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 exemption	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
	COVID-19 Re-Contribution	0.00
	<b>Total Other contributions</b>	<b>0.00</b>

**Transactions**

<b>Date</b>	<b>Contribution Type</b>	<b>Concessional</b>	<b>Non-Concessional</b>	<b>Other</b>	<b>Source</b>
14/06/2023	Employer Mandated	946.28			manual
27/06/2023	Personal	25,000.00			manual
	<b>Totals:</b>	<b>25,946.28</b>			

**Kearland Superannuation Fund**  
**Contribution Caps**  
**For the Period From 1 July 2022 to 30 June 2023**

**Mr James Kearley**

**Date of Birth:** 09 Nov 1995  
**Age:** 27 (at 30/06/2023)  
**Status:** Member may be eligible for the bring forward rule, certain conditions apply

**Contributions Summary**

<b>Prior Year Contributions</b>		<b>Non-Concessional</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	
<b>Current Year Contributions</b>	<b>Note</b>	<b>Concessional</b>	<b>Non-Concessional</b>
Caps	1	27,500.00	110,000.00
Cumulative Available Unused Cap	2	102,500.00	0.00
Contributions made (to this fund)	3	3,937.50	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		3,937.50	0.00
Amount above caps	4	0.00	0.00
Available		126,062.50	110,000.00

**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**

Superstreamed

<u>Income Type</u>	<u>Contribution Type</u>	<u>Amount</u>
<b>Concessional</b>	<b>Employer</b>	<b>3,937.50</b>
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	<b>Contributions as allocated</b>	<b>3,937.50</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 exemption	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
	COVID-19 Re-Contribution	0.00
<b>Total Other contributions</b>		<b>0.00</b>

**Transactions**

<b>Date</b>	<b>Contribution Type</b>	<b>Concessional</b>	<b>Non-Concessional</b>	<b>Other</b>	<b>Source</b>
28/06/2023	Employer Mandated	3,937.50			smsfdataflow
<b>Totals:</b>		<b>3,937.50</b>			

**SMSF DataFlow Transactions**

<b>Payment Date</b>	<b>Contribution Type</b>	<b>Amount</b>	<b>Payment Reference</b>	<b>Status</b>
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**Kearland Superannuation Fund**  
**Contribution Caps**  
**For the Period From 1 July 2022 to 30 June 2023**

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**Mr James Kearley**

**Astra Walker Pty Ltd**

28/06/2023	Employer Mandated	3,937.50	QUICKSPR3510084096	Automated Feed
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<b>Subtotal:</b>	3,937.50
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Disclaimer: SMSF Dataflow contributions received via SuperStream will only display where smsfdataflow was the elected electronic services address (ESA), and the member and fund details provided to their employer or Super Clearing House matched the records on Class.

**Kearland Superannuation Fund**  
**Contribution Caps**  
**For the Period From 1 July 2022 to 30 June 2023**

**Mr Michael Kearley**

**Date of Birth:** 26 Nov 1990  
**Age:** 32 (at 30/06/2023)  
**Status:** Member may be eligible for the bring forward rule, certain conditions apply

**Contributions Summary**

<b>Prior Year Contributions</b>		<b>Non-Concessional</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	
<b>Current Year Contributions</b>	<b>Note</b>	<b>Concessional</b>	<b>Non-Concessional</b>
Caps	1	27,500.00	110,000.00
Cumulative Available Unused Cap	2	102,500.00	0.00
Contributions made (to this fund)	3	3,932.37	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		3,932.37	0.00
Amount above caps	4	0.00	0.00
Available		126,067.63	110,000.00

**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>
<b>Concessional</b>	<b>Employer</b>	<b>3,932.37</b>
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	<b>Contributions as allocated</b>	<b>3,932.37</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 exemption	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
	COVID-19 Re-Contribution	0.00
<b>Total Other contributions</b>		<b>0.00</b>

**Transactions**

<b>Date</b>	<b>Contribution Type</b>	<b>Concessional</b>	<b>Non-Concessional</b>	<b>Other</b>	<b>Source</b>
30/06/2023	Employer Mandated	3,932.37			manual
	<b>Totals:</b>	<b>3,932.37</b>			

**Kearland Superannuation Fund**  
**Contribution Caps**  
**For the Period From 1 July 2022 to 30 June 2023**

**Mr Wesley Rowland**

**Date of Birth:** 02 Feb 1992  
**Age:** 31 (at 30/06/2023)  
**Status:** Member may be eligible for the bring forward rule, certain conditions apply

**Contributions Summary**

<b>Prior Year Contributions</b>		<b>Non-Concessional</b>	
Contributions for the previous 2 years are not confirmed		Unknown	
3-year cap in effect from previous years		Unknown	
Total non-concessional contributions in previous 2 years		Unknown	
<b>Current Year Contributions</b>	<b>Note</b>	<b>Concessional</b>	<b>Non-Concessional</b>
Caps	1	27,500.00	110,000.00
Cumulative Available Unused Cap	2	102,500.00	0.00
Contributions made (to this fund)	3	2,090.25	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		2,090.25	0.00
Amount above caps	4	0.00	0.00
Available		127,909.75	110,000.00

**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>
<b>Concessional</b>	<b>Employer</b>	<b>2,090.25</b>
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	<b>Contributions as allocated</b>	<b>2,090.25</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 exemption	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
	COVID-19 Re-Contribution	0.00
<b>Total Other contributions</b>		<b>0.00</b>

**Transactions**

<b>Date</b>	<b>Contribution Type</b>	<b>Concessional</b>	<b>Non-Concessional</b>	<b>Other</b>	<b>Source</b>
30/06/2023	Employer Mandated	2,090.25			manual
	<b>Totals:</b>	<b>2,090.25</b>			

**Kearland Superannuation Fund**  
**Contribution Caps**  
**For the Period From 1 July 2022 to 30 June 2023**

**Mrs Joanne Rowland**

**Date of Birth:** 24 Sep 1988  
**Age:** 34 (at 30/06/2023)  
**Status:** Member may be eligible for the bring forward rule, certain conditions apply

**Contributions Summary**

<b>Prior Year Contributions</b>		<b>Non-Concessional</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	
<b>Current Year Contributions</b>	<b>Note</b>	<b>Concessional</b>	<b>Non-Concessional</b>
Caps	1	27,500.00	110,000.00
Cumulative Available Unused Cap	2	102,500.00	0.00
Contributions made (to this fund)	3	918.71	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		918.71	0.00
Amount above caps	4	0.00	0.00
Available		129,081.29	110,000.00

**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>
<b>Concessional</b>	<b>Employer</b>	<b>918.71</b>
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	<b>Contributions as allocated</b>	<b>918.71</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 exemption	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
	COVID-19 Re-Contribution	0.00
	<b>Total Other contributions</b>	<b>0.00</b>

**Transactions**

<b>Date</b>	<b>Contribution Type</b>	<b>Concessional</b>	<b>Non-Concessional</b>	<b>Other</b>	<b>Source</b>
30/06/2023	Employer Mandated	918.71			manual
	<b>Totals:</b>	<b>918.71</b>			

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**Kearland Superannuation Fund**  
**Contribution Caps**  
**For the Period From 1 July 2022 to 30 June 2023**

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**Mrs Lauren Kearley**

**Date of Birth:** 28 Oct 1992

**Age:** 30 (at 30/06/2023)

**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

<b>Current Year Contributions</b>	<b>Note</b>	<b>Concessional</b>	<b>Non-Concessional</b>
Caps	1	27,500.00	110,000.00
Cumulative Available Unused Cap	2	102,500.00	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		130,000.00	110,000.00

**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

## Chaitra Ramesh

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**From:** Elizabeth Meiklejohn  
**Sent:** Tuesday, 26 September 2023 7:24 AM  
**To:** Chaitra Ramesh  
**Subject:** FW: End of year Personal Contributions  
**Attachments:** RecentTransactions\_034-053 486089\_20230925165319.pdf

KEA08s



Elizabeth Meiklejohn SSA CA 

Senior Associate

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**From:** jandrkearley@gmail.com <jandrkearley@gmail.com>  
**Sent:** Monday, September 25, 2023 5:18 PM  
**To:** Elizabeth Meiklejohn <ElizabethM@virtusuper.com.au>  
**Cc:** 'John and Rachel Kearley' <jandrkearley@gmail.com>  
**Subject:** RE: End of year Personal Contributions

Hello Liz

Sorry about the delayed reply, please see the attached file showing the information requested.

From what I can see the super contributions have been allocated to the correct persons, I have raised the question with Micheal as to why there is no contributions showing for his wife, Lauren Kearley.

We will get back to you as to this.

Kind Regards,

John Kearley

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**From:** Elizabeth Meiklejohn <[ElizabethM@virtusuper.com.au](mailto:ElizabethM@virtusuper.com.au)>  
**Sent:** Wednesday, September 20, 2023 7:27 AM  
**To:** [jandrkearley@gmail.com](mailto:jandrkearley@gmail.com)  
**Subject:** RE: End of year Personal Contributions

Hi John



Please see attached. The \$25,000 should be included at item D12.

We would like to make a start on the Super Fund's 2023 financial statements. Would you be able to please email through the following:

- All bank statements from the date the account was opened to 30 June 2023 (for the auditor)
- Please confirm the attached super contributions have been allocated to the correct person

I am on annual leave from tomorrow until Tuesday 3 October. My team will be checking my emails.

Kind regards

Liz



Elizabeth Meiklejohn SSA CA 

Senior Associate

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**From:** [jandrkearley@gmail.com](mailto:jandrkearley@gmail.com) <[jandrkearley@gmail.com](mailto:jandrkearley@gmail.com)>

**Sent:** Tuesday, September 19, 2023 6:24 PM

**To:** Elizabeth Meiklejohn <[ElizabethM@virtusuper.com.au](mailto:ElizabethM@virtusuper.com.au)>

**Subject:** End of year Personal Contributions

Hello Liz,

Can you please advise what paperwork/statement for the personal contribution I made to SMSF I need to submit with my tax for year ending 30<sup>th</sup> June 23.

Kind regards,

John Kearley