



JaK Super
Contribution Caps
For the Period From 1 July 2021 to 30 June 2022

Mr James Rintel

Date of Birth: 9 Apr 1969
Age: 53 (at 30/06/2022)
Status: Member may be eligible for the bring forward rule, certain conditions apply

Contributions Summary

Non-Concessional

Prior Year Contributions

The bring Forward Rule IS being triggered this year
3-year cap in effect from previous years
Total non-concessional contributions in previous 2 years

N/A
N/A

Current Year Contributions	Note	Concessional	Non-Concessional
Caps	1,2	27,500.00	330,000.00
Cumulative Available Unused Cap	3	0.00	0.00
Contributions made (to this fund)	4	27,500.00	330,000.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		27,500.00	330,000.00
Amount above caps	5	0.00	0.00
Available		0.00	0.00

Notes

- 1 . 'Bring Forward Rule' IS being triggered this year **last triggered BF in 19FY. ok to trigger in 22FY**
- 2 . Non-concessional cap shown is the total for current and following 2 years
- 3 . Total Superannuation Balance was \$500,000 or more at 30 June 2021, member not eligible to make catch-up concessional contributions
- 4 . Excludes any unmatched deposits
- 5 . Any excess concessional contributions are treated as non-concessional

Contributions Breakdown

<u>Income Type</u>	<u>Contribution Type</u>	<u>Amount</u>
Concessional	Employer	0.00
	Personal	27,500.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	27,500.00
NonConcessional	Personal	330,000.00
	Spouse	0.00
	Child	0.00
	Transfers from reserve	0.00
	Foreign superannuation fund	0.00
	Contributions as allocated	330,000.00
Other	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
	Total Other contributions	0.00

Transactions

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
06/07/2021	Personal		85,040.00		manual
12/07/2021	Personal		150,000.00		manual
20/07/2021	Personal	27,500.00			manual
20/07/2021	Personal		94,960.00		manual
Totals:		27,500.00	330,000.00		

JaK Super
Contribution Caps
For the Period From 1 July 2021 to 30 June 2022

Mrs Kim Rintel

Date of Birth: 27 Apr 1970
Age: 52 (at 30/06/2022)
Status: Member may be eligible for the bring forward rule, certain conditions apply

Contributions Summary

Non-Concessional

Prior Year Contributions

The bring Forward Rule IS being triggered this year
 3-year cap in effect from previous years N/A
 Total non-concessional contributions in previous 2 years N/A

Current Year Contributions	Note	Concessional	Non-Concessional
Caps	1,2	27,500.00	330,000.00
Cumulative Available Unused Cap	3	0.00	0.00
Contributions made (to this fund)	4	27,500.00	330,000.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		27,500.00	330,000.00
Amount above caps	5	0.00	0.00
Available		0.00	0.00

Notes

- 1 . 'Bring Forward Rule' IS being triggered this year **last triggered BF in 19FY. ok to trigger in 22FY**
- 2 . Non-concessional cap shown is the total for current and following 2 years
- 3 . Concessional contribution cap has been used up in prior year(s), member has no unused concessional contribution cap carry forward
- 4 . Excludes any unmatched deposits
- 5 . Any excess concessional contributions are treated as non-concessional

Contributions Breakdown

<u>Income Type</u>	<u>Contribution Type</u>	<u>Amount</u>
Concessional	Employer	0.00
	Personal	27,500.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	27,500.00
NonConcessional	Personal	330,000.00
	Spouse	0.00
	Child	0.00
	Transfers from reserve	0.00
	Foreign superannuation fund	0.00
	Contributions as allocated	330,000.00
Other	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
	Total Other contributions	0.00

Transactions

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
06/07/2021	Personal		85,040.00		manual
12/07/2021	Personal		150,000.00		manual
20/07/2021	Personal	27,500.00			manual
20/07/2021	Personal		94,960.00		manual
Totals:		27,500.00	330,000.00		

Elizabeth Meiklejohn

From: Elizabeth Meiklejohn
Sent: Tuesday, 1 June 2021 10:59 AM
To: Rachel Green-Luther
Subject: FW: JaK Super - ncc in-specie

Hi RGL

I will make a file note.

Jamie and Kim plan to make non concessional contributions of \$330k each in July 2021.

They will also make concessional contribution of \$27,500 each in July 2021.

This will be done via in-specie contributions of listed shares.

Jamie will send through the OMTs in July/August. I will make an iFirm reminder.

Thanks

Liz

From: Michael Drakos <michaeld@mtaccountants.com.au>
Sent: Tuesday, 1 June 2021 10:39 AM
To: Elizabeth Meiklejohn <ElizabethM@virtusuper.com.au>
Subject: JaK Super

Hi Liz

Spoke with Jamie regarding his non concessional contributions for the next 3 years.

Would you be able to give me a call on my mobile 0418850163 just have a couple of questions I need to clarify for him

Thanks
Michael

PS – We are always open for new business so please pass on our details to any friends, family or colleagues whom would benefit from our services.



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Michael Drakos | Manager

☎ 07 3422 8000

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Michael Drakos | Manager

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Rachel Green-Luther

From: Ha Nguyen <hanguyen@mtaccountants.com.au>
Sent: Wednesday, 14 September 2022 4:02 PM
To: Rachel Green-Luther
Cc: Michael Drakos
Subject: FW: RIN01S - 22FY super contributions
Attachments: For MT - Super Contributions 22FY Ledger.pdf; C1 - VACF Off Market Transfer - Rintel06072021.pdf; James Rintel.pdf; Kim Rintel.pdf

Hey Rach,

I've reviewed their taxable incomes and confirm we're happy with the super contributions

The returns are currently being drafted but we will claim the super contribution

PS – We are always open for new business so please pass on our details to any friends, family or colleagues whom would benefit from our services.



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Ha Nguyen | Accountant

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From: Michael Drakos <michaeld@mtaccountants.com.au>

Sent: Tuesday, 13 September 2022 2:27 PM

To: Ha Nguyen <hanguyen@mtaccountants.com.au>

Subject: FW: RIN01S - 22FY super contributions

PS – We are always open for new business so please pass on our details to any friends, family or colleagues whom would benefit from our services.



Creating peace of mind,

Michael Drakos | Manager

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JaK Super

Transactions: Member Receipts - JaK Super

Date Range: 01/07/2021 to 30/06/2022

Please note that Period Update has not been run to the end date of this report. As a result, the figures shown in the report may not be accurate.

Member Receipts

	Date	Narrative	Debit	Credit	Balance	Quantity
Contributions						
Member						
Personal Concessional						
Mr James Rintel						
01/07/2021	Opening Balance		\$	0.00	\$ 0.00	Cr
20/07/2021	SMSF CONTRIBUTION		\$	27,500.00	\$ 27,500.00	Cr
Total Mr James Rintel		\$	0.00	\$ 27,500.00	\$ 27,500.00	Cr
Mrs Kim Rintel						
01/07/2021	Opening Balance		\$	0.00	\$ 0.00	Cr
20/07/2021	SMSF CONTRIBUTION		\$	27,500.00	\$ 27,500.00	Cr
Total Mrs Kim Rintel		\$	0.00	\$ 27,500.00	\$ 27,500.00	Cr
Total Personal Concessional		\$	0.00	\$ 55,000.00	\$ 55,000.00	Cr
Personal Non-Concessional						
Mr James Rintel						
01/07/2021	Opening Balance		\$	0.00	\$ 0.00	Cr
06/07/2021	OMT VACF		\$	85,040.00	\$ 85,040.00	Cr
12/07/2021	Rintel J E & Rin SMSF Contribution		\$	150,000.00	\$ 235,040.00	Cr
20/07/2021	SMSF CONTRIBUTION		\$	94,960.00	\$ 330,000.00	Cr
Total Mr James Rintel		\$	0.00	\$ 330,000.00	\$ 330,000.00	Cr
Mrs Kim Rintel						
01/07/2021	Opening Balance		\$	0.00	\$ 0.00	Cr
06/07/2021	OMT VACF		\$	85,040.00	\$ 85,040.00	Cr
12/07/2021	Rintel J E & Rin SMSF Contribution		\$	150,000.00	\$ 235,040.00	Cr
20/07/2021	SMSF CONTRIBUTION		\$	94,960.00	\$ 330,000.00	Cr
Total Mrs Kim Rintel		\$	0.00	\$ 330,000.00	\$ 330,000.00	Cr
Total Personal Non-Concessional		\$	0.00	\$ 660,000.00	\$ 660,000.00	Cr
Total Member		\$	0.00	\$ 715,000.00	\$ 715,000.00	Cr
Total Contributions		\$	0.00	\$ 715,000.00	\$ 715,000.00	Cr
Total Member Receipts		\$	0.00	\$ 715,000.00	\$ 715,000.00	Cr

James Rintel

Client ref

RIN01A1

File no 150 763 212
ABN 23 750 751 717

D7 Interest deductions

Description	Amount
Custody Fee - Fiig Securities	
Total D7 expenses	

D10 Cost of managing tax affairs

Other expense incurred in managing your tax affairs	
Description	Amount
Accounting Fees	
Total D10M expenses	

D12 Personal superannuation contributions

Did you provide your fund (including a retirement savings accounts) with a notice of intent to claim a deduction for personal superannuation contributions, and receive an acknowledgement from your fund? ☒

Fund name	JAK SUPER
Fund ABN	84 481 685 813
Account number	1
Deduction claimed	27500.00

D15 Other deductions

D - Deductions relating to financial investments	
Description	Amount
Loss on Bonds	
Total D15J expenses	

NOTE: THIS PRINT-OUT IS NOT TO BE LODGED WITH THE ATO.

File no 156 927 385
ABN 94 506 957 280

D7 Interest deductions

Description	Amount
Custody Fee - Fiig Securities	

Total D7 expenses**D10 Cost of managing tax affairs****Other expense incurred in managing your tax affairs**

Description	Amount
Accounting Fees	

Total D10M expenses**D12 Personal superannuation contributions**

Did you provide your fund (including a retirement savings accounts) with a notice of intent to claim a deduction for personal superannuation contributions, and receive an acknowledgement from your fund? ☒ Y

Fund name	JAK SUPER
Fund ABN	84 481 685 813
Account number	2
Deduction claimed	27500.00

D15 Other deductions**D - Deductions relating to financial investments**

Description	Amount
Loss on Bonds	

Total D15J expenses**NOTE: THIS PRINT-OUT IS NOT TO BE LODGED WITH THE ATO.**



Australian Government
Australian Taxation Office

Agent MARSH TINCKNELL EASTSIDE

Client RINTEL, JAMES

ABN 23 750 751 717

Bring forward arrangement

Important

- All data is based on information reported to us by your client, or their super funds, and processed through our systems.
- Decisions made with this information can have tax consequences for your client. Your clients can refer to their own records or contact their funds to obtain up-to-date information.

Your bring forward arrangement has ended.

- Your bring forward arrangement was triggered in the 2018-19 financial year.
- Your bring forward cap was \$300,000 with reported contributions of \$0.00.



Australian Government
Australian Taxation Office

Agent MARSH TINCKNELL EASTSIDE

Client RINTEL, KIM

ABN 94 506 957 280

Bring forward arrangement

Important

- All data is based on information reported to us by your client, or their super funds, and processed through our systems.
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Your bring forward arrangement has ended.

- Your bring forward arrangement was triggered in the 2018-19 financial year.
- Your bring forward cap was \$300,000 with reported contributions of \$0.00.