

G & M THISTLEWAITE SUPER FUND

Contribution Caps

For the Period From 1 July 2020 to 30 June 2021

Mr Garry Thistlewaite

Date of Birth: 21 Jun 1953
 Age: 68 (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 NOT triggered in the previous 2 years
 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	25,000.00	100,000.00
Cumulative Available Unused Cap	3	45,275.00	0.00
Contributions made (to this fund)	4	18,000.00	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		18,000.00	0.00
Amount above caps	5	0.00	0.00
Available		52,275.00	100,000.00

Notes

- 'Bring Forward Rule' can NOT be triggered this year; member was 67 or older
- Non-concessional cap shown applies to current year only
- Member may be eligible to make catch-up concessional contributions
- Excludes any unmatched deposits
- Any excess concessional contributions are treated as non-concessional

Contributions Breakdown

Income Type	Contribution Type	Amount
Concessional	Employer	18,000.00
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	18,000.00
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	0.00
	Government Co-Contributions	348.75
	Directed termination payment (taxed)	0.00
	Directed termination payment (untaxed)	0.00
	Personal injury election	0.00
	Downsizer Contribution	0.00
	Total Other contributions	348.75

Transactions

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
22/07/2020	Government Co-Contributions			348.75	manual
19/11/2020	Employer Mandated	3,000.00			manual
15/02/2021	Employer Mandated	1,500.00			manual
01/03/2021	Employer Mandated	1,500.00			manual
15/03/2021	Employer Mandated	1,500.00			manual
29/03/2021	Employer Mandated	1,500.00			manual

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Date	Contribution Type	Concessional	Non-Concessional	Other	Source
12/04/2021	Employer Mandated	1,500.00			manual
26/04/2021	Employer Mandated	1,500.00			manual
10/05/2021	Employer Mandated	1,500.00			manual
24/05/2021	Employer Mandated	1,500.00			manual
07/06/2021	Employer Mandated	1,500.00			manual
21/06/2021	Employer Mandated	1,500.00			manual
Totals:		18,000.00		348.75	

G & M THISTLEWAITE SUPER FUND
Contribution Caps
For the Period From 1 July 2020 to 30 June 2021

Mrs Marisa Thistlewaite

Date of Birth: 21 Jun 1963

Age: 58 (at 30/06/2021)

Status: Member may be eligible for the bring forward rule, certain conditions apply

Contributions Summary

Non-Concessional

Prior Year Contributions

The 'Bring Forward Rule' was NOT triggered in the previous 2 years

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	25,000.00	100,000.00
Cumulative Available Unused Cap	3	50,000.00	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		75,000.00	100,000.00

Notes

- 1 . 'Bring Forward Rule' MAY be triggered this year
- 2 . Non-concessional cap shown applies to current year only
- 3 . Member may be eligible to make catch-up concessional contributions
- 4 . Excludes any unmatched deposits
- 5 . Any excess concessional contributions are treated as non-concessional

Brenda Wishey

From: Colin Harvey <colin@altuspartners.com.au>
Sent: Tuesday, 11 January 2022 3:40 PM
To: Brenda Wishey
Subject: RE: GARRY THISTLEWAITE contributions

Hi Brenda

Yes I can confirm the \$18,000 was employer contributions, if it matters \$15,720 was salary sacrifice and \$2,280 was SG. Yes he met the work test for the 2021 year.

Kind regards
Colin



Colin Harvey
Director

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From: Brenda Wishey <BrendaW@virtusuper.com.au>
Sent: Sunday, 2 January 2022 12:55 PM
To: Colin Harvey <colin@altuspartners.com.au>
Subject: RE: GARRY THISTLEWAITE contributions

Good morning Col

We are currently working on Garry and Marisa's super fund for 2021 year.

We have \$18,000 of employer contributions for Garry in the 2021 year. Can you confirm that we have treated this correctly and if he met the work test?

Kind regards
Brenda

7.6.21	Cobra Systems		\$	1,500.00
21.6.21	Cobra Systems		\$	1,500.00
30.6.21	Suncorp	\$	0.19	

Yearly Contributions		\$	18,000.00	\$
Total Interest Income	\$	2,572.50		
Other Deposits				\$ 904.50
Total Deposits	\$	21,477.00		

Add Low income super = \$348.75
Total Contributions = \$18,348.75

**Year 1/7/20 to 30/6/21
WITHDRAWALS**

		<u>Expenses</u>	<u>Tax Installments</u>	<u>Garry Pension</u>	<u>Marisa Pension</u>
23.7.29	Garry Pension			\$ 1,900.00	
29.8.20	Marisa Pension				\$ 10,000.00
3.11.20	Garry Pension			\$ 10,000.00	
27.11.20	Garry Pension			\$ 3,000.00	
17.2.21	Garry Pension			\$ 1,500.00	
2.3.21	Garry Pension			\$ 1,500.00	
17.3.21	Garry Pension			\$ 1,500.00	
1.4.21	Garry Pension			\$ 1,500.00	
1.4.21	Garry Pension			\$ 9,000.00	
9.4.21	Garry Pension			\$ 5,000.00	
17.4.21	Garry Pension			\$ 6,000.00	
29.4.21	Garry Pension			\$ 1,500.00	
12.5.21	Garry Pension			\$ 1,500.00	
5.6.21	Garry Pension			\$ 1,500.00	
25.6.21	ATO		\$ 534.30		
10.6.21	Virtu	\$ 2,508.00			
		\$ 2,508.00	\$ 534.30	\$ 45,400.00	\$ 10,000.00

Superannuation remittance advice

Provider: THE TRUSTEE FOR G & M THISTLEWAITE SUPER FUND
 Tax file number: 802 930 962
 Remittance type: Low income super amount

Payment for	Account/Other ID	TFN	Date of birth	Remittance reference number	Financial year	Payment
Garry Thistlewaite	1	475 707 549	21/6/1953	7025620225335	2019	✓ \$348.75

Payment details	Description	Processed date	Credit
	Low income super amount remittance	22 July 2020	\$348.75 CR
		Total payment amount	\$348.75 CR

