

## G &amp; 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

- 1 . 'Bring Forward Rule' can NOT be triggered this year; member was 67 or older
- 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

## Contributions Breakdown

<u>Income Type</u>	<u>Contribution Type</u>	<u>Amount</u>
Concessional	Employer	18,000.00
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
NonConcessional	Contributions as allocated	18,000.00
	Personal	0.00
	Spouse	0.00
	Child	0.00
	Transfers from reserve	0.00
	Foreign superannuation fund	0.00
Other	Contributions as allocated	0.00
	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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**G & M THISTLEWAITE SUPER FUND**  
**Contribution Caps**  
**For the Period From 1 July 2020 to 30 June 2021**

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**Mr Garry Thistlewaite**

<b>Date</b>	<b>Contribution Type</b>	<b>Concessional</b>	<b>Non-Concessional</b>	<b>Other</b>	<b>Source</b>
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
<b>Totals:</b>		<b>18,000.00</b>		<b>348.75</b>	

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

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**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

<b>Current Year Contributions</b>	<b>Note</b>	<b>Concessional</b>	<b>Non-Concessional</b>
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

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**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	

<b>Yearly Contributions</b>	<b>\$</b>	<b>18,000.00</b>	<b>\$</b>
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Add Low income super = \$348.75

Total Contributions = \$18,348.75

**Total Interest Income**      \$    2,572.50

**Other Deposits**      \$    904.50

**Total Deposits**      \$    21,477.00

**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

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

