

# THE WESTCOTT SUPERANNUATION FUND

## Contribution Caps

For the Period From 1 July 2021 to 30 June 2022

Brenda Wishey

### Mr Gregory Westcott

**Date of Birth:** 02 Sep 1962  
**Age:** 59 (at 30/06/2022)  
**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

| Current Year Contributions          | Note | Concessional | Non-Concessional |
|-------------------------------------|------|--------------|------------------|
| Caps                                | 1    | 27,500.00    | 110,000.00       |
| Cumulative Available Unused Cap     | 2    | 0.00         | 0.00             |
| Contributions made (to this fund)   | 3    | 5,538.76     | 0.00             |
| Contributions made (to other funds) |      | 0.00         | 0.00             |
| Contributions as allocated          |      | 5,538.76     | 0.00             |
| Amount above caps                   | 4    | 0.00         | 0.00             |
| Available                           |      | 21,961.24    | 110,000.00       |

#### 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 2021, 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>   |
|------------------------|---|-----------------|
| <b>Concessional</b>    | <b>Employer</b>                         | <b>5,538.76</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>5,538.76</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

| Date       | Contribution Type | Concessional | Non-Concessional | Other | Source |
|------------|-------------------|--------------|------------------|-------|--------|
| 26/07/2021 | Employer Mandated | 1,167.95     |                  |       | manual |
| 26/10/2021 | Employer Mandated | 1,398.83     |                  |       | manual |
| 27/01/2022 | Employer Mandated | 1,923.06     |                  |       | manual |
| 28/04/2022 | Employer Mandated | 1,048.92     |                  |       | manual |

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## Contribution Caps

For the Period From 1 July 2021 to 30 June 2022

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Mr Gregory Westcott

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|         |          |
|---------|----------|
| Totals: | 5,538.76 |
|---------|----------|

# THE WESTCOTT SUPERANNUATION FUND

## Contribution Caps

For the Period From 1 July 2021 to 30 June 2022

### Mrs Vicky Westcott

Date of Birth: 26 Apr 1964

Age: 58 (at 30/06/2022)

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

| Current Year Contributions          | Note | Concessional | Non-Concessional |
|-------------------------------------|------|--------------|------------------|
| Caps                                | 1    | 27,500.00    | 110,000.00       |
| Cumulative Available Unused Cap     | 2    | 0.00         | 0.00             |
| Contributions made (to this fund)   | 3    | 5,538.76     | 0.00             |
| Contributions made (to other funds) |      | 0.00         | 0.00             |
| Contributions as allocated          |      | 5,538.76     | 0.00             |
| Amount above caps                   | 4    | 0.00         | 0.00             |
| Available                           |      | 21,961.24    | 110,000.00       |

#### 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 2021, 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>   |
|------------------------|---|-----------------|
| <b>Concessional</b>    | <b>Employer</b>                         | <b>5,538.76</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>5,538.76</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

| Date       | Contribution Type | Concessional | Non-Concessional | Other | Source |
|------------|-------------------|--------------|------------------|-------|--------|
| 26/07/2021 | Employer Mandated | 1,167.95     |                  |       | manual |
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| 28/04/2022 | Employer Mandated | 1,048.92     |                  |       | manual |

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# THE WESTCOTT SUPERANNUATION FUND

## Contribution Caps

For the Period From 1 July 2021 to 30 June 2022

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Mrs Vicky Westcott

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|         |          |
|---------|----------|
| Totals: | 5,538.76 |
|---------|----------|

## Brenda Wishey

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**From:** Gregory O'Donnell <gregory@altuspartners.com.au>  
**Sent:** Tuesday, 3 January 2023 9:15 AM  
**To:** Brenda Wishey  
**Subject:** RE: WESTCOTT SUPERANNUATION FUND - 2022 Contribution Confirmation

Hi brenda

Those would have come from laser clinics before Greg and Vicki sold. The split would be right ad there were just sgc on wages.

I havent completed 2022 yet but will be soon once I'm back in a few weeks. I'll get teresa to send the invoice through for you whe we reopen next week.

Cheers

Greg

Sent on the go with Vodafone



Gregory O'Donnell  
Director

Altus Partners Pty Ltd ACN 149 120 561

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***Please note our office will be closed for the Christmas period from 4:30pm Thursday 15th December 2022 and will return on Monday 16th January 2023. In addition to the office closure, I will be taking a further week of leave return Monday 16th January 2023.***

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----- Original message -----

**From:** Brenda Wishey <BrendaW@virtusuper.com.au>  
**Date:** 3/1/23 6:55 am (GMT+10:00)  
**To:** Gregory O'Donnell <gregory@altuspartners.com.au>  
**Subject:** WESTCOTT SUPERANNUATION FUND - 2022 Contribution Confirmation

Good morning Greg

Happy New Year!

Please find attached the contribution ledger from the Super Fund for the 2021-2022 financial year.

Can you confirm that the contribution split is correct?

|       |           |            |
|-------|-----------|------------|
| Greg  | Employer  | \$5,538.76 |
| Vicky | Employer` | \$5,538.76 |

We also require a copy of the invoice for ASIC Annual Review from August 2021.

If you have any questions in relation to the above, please do not hesitate to contact us.

Kind regards  
Brenda



**Brenda Wishey**  
Senior Accountant

**VIRTU** | *self managed super specialists*  
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🌐 [www.virtusuper.com.au](http://www.virtusuper.com.au)



We are closed from 5pm on Wednesday 21st December and returning Monday 9th January.

We wish you a very Merry Christmas and a Happy New Year!

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