

L RUSSELL SUPERFUND
Contribution Caps
For the Period From 1 July 2021 to 30 June 2022

Brenda Wishey

Ms Linelle Russell

Date of Birth: 12 Jul 1947
Age: 74 (at 30/06/2022)
Status: Only employer or personal contributions allowed subject to the work test

Contributions Summary

		Non-Concessional	
Prior Year Contributions			
The 'Bring Forward Rule' was unavailable in previous 2 years; member was 65 or older		N/A	
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	110,000.00
Cumulative Available Unused Cap	3	0.00	0.00
Contributions made (to this fund)	4	27,500.00	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		27,500.00	0.00
Amount above caps	5	0.00	0.00
Available		0.00	110,000.00

Notes

- 1 . 'Bring Forward Rule' can NOT be triggered this year; total superannuation balance at 30 June 2021 is on or over \$1,500,000
- 2 . Non-concessional cap shown applies to current year only
- 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
	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 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
29/07/2021	Personal	2,000.00			manual
12/08/2021	Personal	2,000.00			manual
09/09/2021	Personal	2,000.00			manual
12/10/2021	Personal	2,000.00			manual
15/11/2021	Personal	6,000.00			manual

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Ms Linelle Russell

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
17/12/2021	Personal	6,000.00			manual
07/01/2022	Personal	6,000.00			manual
01/03/2022	Personal	1,500.00			manual
	Totals:	27,500.00			

Chaitra Ramesh

From: Edward Glasson <EdwardG@mtaccountants.com.au>
Sent: Monday, 12 September 2022 11:02 AM
To: Chaitra Ramesh
Cc: Elizabeth Meiklejohn; Sophie Fairlie
Subject: RE: L Russell Superfund - Contribution confirmation

Hi Chai

That will be correct.

Cheers

Ed

Linelle meets the work test
She worked 5 days a week in
her daughters shop
She retired shortly after her 75th birthday in July 2022

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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financial success, and freedom of choice*



Edward Glasson | Director

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From: Chaitra Ramesh <ChaitraR@virtusuper.com.au>
Sent: Monday, 12 September 2022 10:55 AM
To: Edward Glasson <EdwardG@mtaccountants.com.au>
Cc: Virtu - ElizabethM - External <Elizabethm@virtusuper.com.au>
Subject: L Russell Superfund - Contribution confirmation

Hi Ed,

I hope you are doing well.

I am currently wrapping up L Russell Superfund 2022 FY for Liz.

Could you please confirm the super contributions made for the period ended 30 June 2022? We have the following –

- a. Linelle Russell - \$27,500

I have attached a copy of the super contributions' ledger and the S290s for your perusal.

Thank you very much.

Regards,
Chai



Chaitra Ramesh

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