The Tweed Superannuation Fund
Contribution Caps
For the Period From 1 July 2022 to 30 June 2023

Brenda Wishey

Mr Stuart Litchfield

Date of Birth:	23 Dec 1946
Age:	76 (at 30/06/2023)
Status:	Generally no contributions allowed, some exceptions apply

Contributions Summary

Prior Year Contributions	Non-Concessional
The 'Bring Forward Rule' was unavailable in previous 2 years; member was 65 or older	
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	0.00
Cumulative Available Unused Cap	3	0.00	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		27,500.00	0.00

Notes

1 . 'Bring Forward Rule' can NOT be triggered on and after the date of member's 75th birthday
2 . Non-concessional cap shown applies to current year only
3 . Total Superannuation Balance was $500,000 or more at 30 June 2022, member not eligible to make catch-up concessional contributions
4 . Excludes any unmatched deposits
5 . Any excess concessional contributions are treated as non-concessional

The Tweed Superannuation Fund
Contribution Caps
For the Period From 1 July 2022 to 30 June 2023

Mrs Sharon Litchfield

Date of Birth:	10 Jul 1949
Age:	73 (at 30/06/2023)
Status:	Member may be eligible for the bring forward rule, certain conditions apply

Contributions Summary

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

Notes
1 . 'Bring Forward Rule' MAY be triggered this year
2 . Non-concessional cap shown applies to current year only
3 . Total Superannuation Balance was $500,000 or more at 30 June 2022, 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

Income Type	Contribution Type	Amount
Concessional	Employer	27,500.00
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	**27,500.00**
NonConcessional	Personal	110,000.00
	Spouse	0.00
	Child	0.00
	Transfers from reserve	0.00
	Foreign superannuation fund	0.00
	Contributions as allocated	**110,000.00**
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
14/03/2023	Employer Mandated	27,500.00			manual
14/03/2023	Personal		110,000.00		manual
	Totals:	**27,500.00**	**110,000.00**		

Mrs Sharon Litchfield

Contributions & Min Pensions

Spoke to Stuart 29/5/23, they are going away for a few weeks.

They made their minimum pension payments in March 2023 of the below amounts.

Sharon has made her employer contributions and non-concessional contributions in March 2023.

Minimum Pensions
     Stuart $27,860
     Sharon $22,560

Contribution Caps
     Sharon

Personal Concessional	$27,500 (Must meet work test) or
Employer (Salary Sacrifice)	$27,500 (No requirement to meet work test)
Non-Concessional	$110,000 (No requirement to meet work test)