

GTI FAMILY SUPERANNUATION FUND
Contribution Caps
For the Period From 1 July 2022 to 30 June 2023

Mr George Ibrahim

Date of Birth: 11 Feb 1962

Elizabeth Meiklejohn

Age: 61 (at 30/06/2023)

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

Contributions Summary

Prior Year Contributions

Non-Concessional

Contributions for the previous 2 years are not confirmed

3-year cap in effect from previous years

Unknown

Total non-concessional contributions in previous 2 years

Unknown

Current Year Contributions

Note

Concessional

Non-Concessional

Caps	1	27,500.00	110,000.00
Cumulative Available Unused Cap	2	500.00	0.00
Contributions made (to this fund)	3	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	4	0.00	0.00
Available		500.00	110,000.00

Notes

- 1 . Non-concessional cap shown does NOT take prior year 'Bring Forward Rule' usage into account
- 2 . Member may be eligible to make catch-up concessional contributions
- 3 . Excludes any unmatched deposits
- 4 . Any excess concessional contributions are treated as non-concessional

Contributions Breakdown

[See confirmation from client](#)

<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	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 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
28/06/2023	Personal	27,500.00			manual
	Totals:	27,500.00			

Chaitra Ramesh

From: Sarah Brandon <sarahb@mtaccountants.com.au>
Sent: Wednesday, 8 November 2023 10:27 AM
To: Chaitra Ramesh
Cc: Rachel Green-Luther
Subject: RE: IBR06S - Contribution confirmation (George Ibrahim)

Hi Chai

We don't have George's 2023 year end work in yet.

The allocation as personal shouldn't be a problem.

Thanks

Sarah

P.S - Do you know anyone who might also enjoy working with us? We're always open to referrals & helping more like-minded people, so please feel free to forward my details along. Alternatively, we would love a review!



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Sarah Brandon | Supervisor

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From: Chaitra Ramesh <ChaitraR@virtusuper.com.au>
Sent: Wednesday, November 8, 2023 9:33 AM
To: Sarah Brandon <sarahb@mtaccountants.com.au>
Subject: IBR06S - Contribution confirmation (George Ibrahim)

Hi Sarah,

Just following up on the contributions for George Ibrahim.

Could you please let me know if you are happy with the attached allocation of his contributions.

Thanks you so much for your help.

Regards,
Chaitra



Chaitra Ramesh

VIRTU | *self managed super specialists*
1454 Logan Road, Mount Gravatt Q 4122



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www.virtusuper.com.au

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From: Chaitra Ramesh

Sent: Monday, November 6, 2023 10:55 AM

To: Sarah Brandon <sarahb@mtaccountants.com.au>

Cc: Rachel Green-Luther <RachelG@virtusuper.com.au>

Subject: IBR06S - Contribution confirmation (George Ibrahim)

Hi Sarah,

Hope you had a nice weekend.

I am working on GTI Family Superannuation Fund. Just wanted to confirm the contributions for the 23FY.

I have the following personal concessional contributions-

- a. George Ibrahim – \$27,500

Let me know if you are happy with allocation. I have attached a copy of the ledger for your reference.

I will send the S290 once accounts are finalised. Rachel is away this week.

Let me know if you have any questions.

Thanks Sarah,
Chai

Rachel Green-Luther

From: Sarah Brandon <sarahb@mtaccountants.com.au>
Sent: Wednesday, 28 June 2023 8:35 AM
To: George Ibrahim; Rachel Green-Luther
Subject: RE: 2023 Super Contribution

Hi George

Unfortunately, I don't have the SMSF bank details on file.

I have included Rachel from Virtu on this email as she will be able to provide this information to you.

Thanks

Sarah

P.S - Do you know anyone who might also enjoy working with us? We're always open to referrals & helping more like-minded people, so please feel free to forward my details along. Alternatively, we would love a review!



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Sarah Brandon | Senior Accountant

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From: George Ibrahim <gibrahim62@hotmail.com>
Sent: Tuesday, 27 June 2023 7:02 PM
To: Sarah Brandon <sarahb@mtaccountants.com.au>
Subject: Re: 2023 Super Contribution

Hi Sarah

I will transfer the maximum today could you please send me the super bank account numbers I transfer into if you have them on file .

Thank you

Sent from my iPhone

On 27 Jun 2023, at 2:05 am, Sarah Brandon <sarahb@mtaccountants.com.au> wrote:

Hi George

So sorry again for waking you up. I hope you are enjoying your time in the UK.

I just wanted to check in regarding your super fund contributions. The maximum cap to be claimed as a tax deduction is \$27,500 for the 2023 financial year.

Please keep this in mind if you have made any contributions already during the financial year.

Please call me if you would like to discuss.

Kind regards

Sarah

Reference Number: 1931086_1

P.S - Do you know anyone who might also enjoy working with us? We're always open to referrals & helping more like-minded people, so please feel free to forward my details along. Alternatively, we would love a review!

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