

Greg & Dawn Makeham Superannuation Fund
Contribution Caps
For the Period From 1 July 2018 to 30 June 2019

Mr Gregory Makeham

Date of Birth: 27 Jul 1954
Age: 64 (at 30/06/2019)
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, 2	25,000.00	100,000.00
Contributions made (to this fund)	3	17,500.00	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		17,500.00	0.00
Amount above caps	4	0.00	0.00
Available		7,500.00	100,000.00

Notes

1. 'Bring Forward Rule' MAY be triggered this year
2. Non-concessional cap shown does NOT take prior year 'Bring Forward Rule' usage into account
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>
Concessional	Employer	0.00
	Personal	17,500.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	17,500.00
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 exception	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
	Total Other contributions	0.00

Transactions

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
24/12/2018	Personal	10,000.00			manual
02/01/2019	Personal	7,500.00			manual
Totals:		17,500.00			

Greg & Dawn Makeham Superannuation Fund
Contribution Caps
For the Period From 1 July 2018 to 30 June 2019

Mrs Dawn Makeham

Date of Birth: 17 Jun 1954
Age: 65 (at 30/06/2019)
Status: Member must meet work test criteria, other conditions apply

Contributions Summary

Non-Concessional

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

Unknown
Unknown

Current Year Contributions	Note	Concessional	Non-Concessional
Caps	1, 2	25,000.00	100,000.00
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	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	17,500.00
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 exception	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
	Total Other contributions	0.00

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