

Midgley and Lynch Superannuation Fund
Contribution Caps
For the Period From 1 July 2020 to 30 June 2021

Mr Neil Midgley

Elizabeth Meiklejohn

Date of Birth: 9 May 1968

Age: 53 (at 30/06/2021)

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

Unknown

Total non-concessional contributions in previous 2 years

Unknown

Current Year Contributions

	Note	Concessional	Non-Concessional
Caps	1	25,000.00	100,000.00
Cumulative Available Unused Cap	2	15,928.22	0.00
Contributions made (to this fund)	3	19,024.96	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		19,024.96	0.00
Amount above caps	4	0.00	0.00
Available		21,903.26	100,000.00

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

<u>Income Type</u>	<u>Contribution Type</u>	<u>Amount</u>
Concessional	Employer	19,024.96
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	19,024.96
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
15/07/2020	Employer Mandated	1,227.08			smsfdataflow
13/08/2020	Employer Mandated	2,352.83			smsfdataflow
15/09/2020	Employer Mandated	1,667.50			smsfdataflow
15/10/2020	Employer Mandated	1,227.08			smsfdataflow
13/11/2020	Employer Mandated	1,227.08			smsfdataflow
14/12/2020	Employer Mandated	1,227.08			smsfdataflow
14/01/2021	Employer Mandated	1,227.08			smsfdataflow
12/02/2021	Employer Mandated	2,733.83			smsfdataflow

Midgley and Lynch Superannuation Fund
Contribution Caps
For the Period From 1 July 2020 to 30 June 2021

Mr Neil Midgley

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
15/03/2021	Employer Mandated	1,227.08			smsfdataflow
14/04/2021	Employer Mandated	1,227.08			smsfdataflow
12/05/2021	Employer Mandated	1,227.08			smsfdataflow
09/06/2021	Employer Mandated	1,227.08			smsfdataflow
22/06/2021	Employer Mandated	1,227.08			smsfdataflow
	Totals:	19,024.96			

Midgley and Lynch Superannuation Fund
Contribution Caps
For the Period From 1 July 2020 to 30 June 2021

Mrs Karen Lynch

Date of Birth: 12 May 1969
Age: 52 (at 30/06/2021)
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 Unknown
Total non-concessional contributions in previous 2 years Unknown

Current Year Contributions	Note	Concessional	Non-Concessional
Caps	1	25,000.00	100,000.00
Cumulative Available Unused Cap	2	49,681.39	0.00
Contributions made (to this fund)	3	2,919.44	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		2,919.44	0.00
Amount above caps	4	0.00	0.00
Available		71,761.95	100,000.00

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

<u>Income Type</u>	<u>Contribution Type</u>	<u>Amount</u>
Concessional	Employer	2,919.44
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	2,919.44
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	185.80
	Directed termination payment (taxed)	0.00
	Directed termination payment (untaxed)	0.00
	Personal injury election	0.00
	Downsizer Contribution	0.00
	Total Other contributions	185.80

Transactions

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
27/08/2020	Government Co-Contributions			185.80	manual
12/02/2021	Employer Mandated	1,107.73			smsfdataflow
15/03/2021	Employer Mandated	672.92			smsfdataflow
14/04/2021	Employer Mandated	465.87			smsfdataflow
22/06/2021	Employer Mandated	672.92			smsfdataflow
Totals:		2,919.44		185.80	



THE TRUSTEE FOR MIDGLEY AND LYNCH
SUPERANNUATION FUND
29 HERITAGE CRES
DAYBORO QLD 4521

Our reference: 7117866653750
Phone: 13 10 20
ABN: 72 901 531 018

27 August 2020

Superannuation remittance advice

To whom it may concern

An amount of \$185.80 has been forwarded to you from the low income super amount account for THE TRUSTEE FOR MIDGLEY AND LYNCH SUPERANNUATION FUND as per the enclosed remittance advice.

More information about the remittance process is provided on the back of this page, but if you have any questions please phone **13 10 20** between 8.00am and 6.00pm, Monday to Friday.

Yours faithfully

Grant Brodie
Deputy Commissioner of Taxation

Reading your remittance advice

This remittance advice provides details of low income super amounts credited to you for one or more of your members.

Payment for and account details

These details are provided so you can reconcile each payment with the correct member account.

Where you have made a claim for payment, the member and account details will match those you reported to us as part of your claim.

Remittance reference number

This is a unique identifier we assign to the remittance of a member's low income super amount payment.

It is important to note this number as it needs to be quoted if you are not accepting a particular payment on this remittance.

Payment

This is the total amount of low income super amounts being credited for a member.

Tax file numbers

From 1 July 2007, funds cannot accept any member contributions, including low income super amount paid by the Australian Taxation Office unless the fund holds a tax file number for that member.

What should you do if you will not be accepting one or more payments on the remittance?

You will need to complete a *Superannuation payment variation advice* (NAT 8451) statement and lodge it and your repayment with us on or before **2 October 2020**.

The *Completing the Superannuation payment variation advice* (NAT 8450) statement instructions will help you fill out this form.

Your repayment can be sent electronically to us by BPAY® or direct credit, or by cheque enclosed with the completed form.

If you are paying by cheque, please refer to the 'How to pay' information on the *Superannuation payment variation advice* (NAT 8451) statement. This will help you to complete the repayment details.

HOW TO PAY

Your payment reference number (PRN) is:

BPAY®



Billers code: 75556

Ref:

Telephone & Internet Banking – BPAY®

Contact your bank or financial institution to make this payment from your cheque, savings, debit or credit card account.

More info: www.bpay.com.au

CREDIT OR DEBIT CARD

Pay online with your credit or debit card at www.governmenteasypay.gov.au/PayATO

To pay by phone, call the Government EasyPay service on **1300 898 089**.

A card payment fee applies.

OTHER PAYMENT OPTIONS

For other payment options, visit www.ato.gov.au/paymentoptions

Superannuation remittance advice

Provider: THE TRUSTEE FOR MIDGLEY AND LYNCH SUPERANNUATION FUND
Tax file number: 931 344 364
Remittance type: Low income super amount

Payment for	Account/Other ID	TFN	Date of birth	Remittance reference number	Financial year	Payment
Karen Lynch	2	491 078 941	12/5/1969	7025766281004	2020	\$185.80

Payment details	Description	Processed date	Credit
	Low income super amount remittance	26 August 2020	\$185.80 CR
Total payment amount			\$185.80 CR

