

Levey Superannuation Fund
Contribution Caps
For the Period From 1 July 2020 to 30 June 2021

Mr Andrew Levey

Date of Birth: 26 Feb 1971
Age: 50 (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	0.00	0.00
Contributions made (to this fund)	3	18,062.50	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		18,062.50	0.00
Amount above caps	4	0.00	0.00
Available		6,937.50	100,000.00

Notes

- 1 . Non-concessional cap shown does NOT take prior year 'Bring Forward Rule' usage into account
- 2 . Total Superannuation Balance was \$500,000 or more at 30 June 2020, member not 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	13,062.50
	Personal	5,000.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	18,062.50
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
	Total Other contributions	0.00

Transactions

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
30/07/2020	Employer Mandated	1,187.50			smsfdataflow
26/08/2020	Employer Mandated	1,187.50			smsfdataflow
22/09/2020	Employer Mandated	1,187.50			smsfdataflow
22/10/2020	Employer Mandated	1,187.50			smsfdataflow
25/11/2020	Employer Mandated	1,187.50			smsfdataflow
06/01/2021	Employer Mandated	1,187.50			smsfdataflow
28/01/2021	Employer Mandated	1,187.50			smsfdataflow

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Date	Contribution Type	Concessional	Non-Concessional	Other	Source
23/02/2021	Employer Mandated	1,187.50			smsfdataflow
31/03/2021	Employer Mandated	1,187.50			smsfdataflow
07/05/2021	Employer Mandated	1,187.50			smsfdataflow
19/05/2021	Employer Mandated	1,187.50			smsfdataflow
30/06/2021	Personal	5,000.00			manual
Totals:		18,062.50			

Levey Superannuation Fund
Contribution Caps
For the Period From 1 July 2020 to 30 June 2021

Mrs Tina Levey

Date of Birth: 4 Jul 1969
Age: 51 (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	31,665.08	0.00
Contributions made (to this fund)	3	10,835.96	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		10,835.96	0.00
Amount above caps	4	0.00	0.00
Available		45,829.12	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	5,835.96
	Personal	5,000.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	10,835.96
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 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
	Total Other contributions	0.00

Transactions

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
09/07/2020	Employer Mandated	200.76			smsfdataflow
30/07/2020	Employer Mandated	395.83			smsfdataflow
08/08/2020	Employer Mandated	200.76			smsfdataflow
26/08/2020	Employer Mandated	395.83			smsfdataflow
09/09/2020	Employer Mandated	200.76			smsfdataflow
22/09/2020	Employer Mandated	395.83			smsfdataflow
09/10/2020	Employer Mandated	301.14			smsfdataflow
22/10/2020	Employer Mandated	395.83			smsfdataflow

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Mrs Tina Levey

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
07/11/2020	Employer Mandated	204.38			smsfdataflow
25/11/2020	Employer Mandated	395.83			smsfdataflow
09/12/2020	Employer Mandated	102.19			smsfdataflow
06/01/2021	Employer Mandated	395.83			smsfdataflow
28/01/2021	Employer Mandated	395.83			smsfdataflow
23/02/2021	Employer Mandated	395.83			smsfdataflow
31/03/2021	Employer Mandated	395.83			smsfdataflow
07/05/2021	Employer Mandated	395.83			smsfdataflow
19/05/2021	Employer Mandated	395.83			smsfdataflow
09/06/2021	Employer Mandated	271.84			smsfdataflow
30/06/2021	Personal	5,000.00			manual
Totals:		10,835.96			