



# B DUNN SUPERANNUATION FUND

## Contribution Caps

For the Period From 1 July 2021 to 30 June 2022

### Mr Barry Dunn

**Date of Birth:** 06 Aug 1952  
**Age:** 69 (at 30/06/2022)  
**Status:** Member must meet work test criteria, other conditions apply

### Contributions Summary

#### Prior Year Contributions

The 'Bring Forward Rule' was NOT triggered in the previous 2 years  
3-year cap in effect from previous years  
Total non-concessional contributions in previous 2 years

#### Non-Concessional

N/A  
N/A

Current Year Contributions	Note	Concessional	Non-Concessional
Caps	1	27,500.00	0.00
Cumulative Available Unused Cap	2	0.00	0.00
Contributions made (to this fund)	3	25,000.00	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		25,000.00	0.00
Amount above caps	4	0.00	0.00
Available		2,500.00	0.00

#### Notes

- 1 . Total Superannuation Balance was \$1.7 million or more at 30 June 2021, member not eligible to make Non-Concessional Contributions
- 2 . Total Superannuation Balance was \$500,000 or more at 30 June 2021, 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>
<b>Concessional</b>	Employer	0.00
	Personal	25,000.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	<b>Contributions as allocated</b>	<b>25,000.00</b>
<b>NonConcessional</b>	Personal	0.00
	Spouse	0.00
	Child	0.00
	Transfers from reserve	0.00
	Foreign superannuation fund	0.00
	<b>Contributions as allocated</b>	<b>0.00</b>
<b>Other</b>	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
	<b>Total Other contributions</b>	<b>0.00</b>

### Transactions

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
09/06/2022	Personal	22,000.00			manual
10/06/2022	Personal	3,000.00			manual
<b>Totals:</b>		<b>25,000.00</b>			

---

**B DUNN SUPERANNUATION FUND**  
**Contribution Caps**  
**For the Period From 1 July 2021 to 30 June 2022**

---

## Rachel Green-Luther

---

**From:** Brett Dunn <brettd@mtaccountants.com.au>  
**Sent:** Monday, 5 December 2022 9:06 AM  
**To:** Rachel Green-Luther  
**Subject:** RE: DUN02S - 22FY super contributions

Hi Rach,

Happy with the contributions being personal concessional. So you can complete on that basis.

We haven't done the 2022 return as yet but I'll forward on once it's done showing the deduction in his return

Ta

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!



*Creating peace of mind,  
financial success, and freedom of choice*



**Brett Dunn** | Partner

☎ 07 3422 8000  
✉ PO Box 83, Mount Gravatt Q 4122  
📍 Lvl 1, 1454 Logan Rd Mt Gravatt Central Q 4122  
🌐 [www.marsh tincknell.com.au](http://www.marsh tincknell.com.au)

[Pay your bill online](#)

[Connect with us](#)

Marsh Tincknell Pty Ltd ACN 137 316 815

Liability limited by a scheme approved under Professional Standards legislation

Disclaimer: If the information in this email relates to your business, personal or financial affairs, it is either factual or was in relation to taxation advice, therefore does not constitute financial product advice and should not be relied upon as financial product advice. Taxation is only one of the matters that you need to consider when making a decision and non-financial information provided takes into account your personal objectives, financial situation or needs. You must determine whether the information is appropriate in terms of your particular circumstances. For financial product advice that takes account of your particular objectives, financial situation or needs, you should consider seeking financial advice from an Australian Financial Services licensee before making a financial decision.

Please note that collection, use and storage of all information held by the MT Group is governed by our Privacy Policy. This email and any attachment are confidential. If you are not the intended recipient, please notify Marsh Tincknell by reply email and delete this email. Please note that you must not access or use this email or any information in it. Marsh Tincknell accepts no liability for viruses in this email or in any attachment to it.

---

**From:** Rachel Green-Luther <RachelG@virtusuper.com.au>  
**Sent:** Monday, 5 December 2022 8:52 AM  
**To:** Brett Dunn <brettd@mtaccountants.com.au>  
**Subject:** RE: DUN02S - 22FY super contributions

Hi Bretty,

Any updates on Baz's 2022FY super contributions?

For DUN02S 22FY, could you please:

## Transactions: Member Receipts - B DUNN SUPERANNUATION FUND

Date Range: 01/07/2021 to 30/06/2022

*Please note that Period Update has not been run to the end date of this report. As a result, the figures shown in the report may not be accurate.*

## Member Receipts

	Date	Narrative	Debit	Credit	Balance	Quantity
<b>Contributions</b>						
<b>Member</b>						
<b>Personal Concessional</b>						
Mr Barry Dunn						
	01/07/2021	Opening Balance	\$	0.00	\$ 0.00	Cr
	09/06/2022	Transfer from B.DUNN INVESTMENT TRUST Pension #0940512609	\$	22,000.00	\$ 22,000.00	Cr
	10/06/2022	From B.DUNN INVESTMENT TRUST Pension	\$	3,000.00	\$ 25,000.00	Cr
	Total Mr Barry Dunn		\$ 0.00	\$ 25,000.00	\$ 25,000.00	Cr
	Total Personal Concessional		\$ 0.00	\$ 25,000.00	\$ 25,000.00	Cr
	Total Member		\$ 0.00	\$ 25,000.00	\$ 25,000.00	Cr
	Total Contributions		\$ 0.00	\$ 25,000.00	\$ 25,000.00	Cr
	Total Member Receipts		\$ 0.00	\$ 25,000.00	\$ 25,000.00	Cr

## Rachel Green-Luther

---

**From:** Brett Dunn <BrettD@mtaccountants.com.au>  
**Sent:** Tuesday, 11 October 2022 7:11 AM  
**To:** Rachel Green-Luther  
**Subject:** RE: DUN02S - 22FY super contributions

Hi Rach,

I can confirm Barry meets the work test

Can you give me a month or so in relation to the contribution treatment? I'd like to see the business results for the child care centres to see if it's worth claiming tax deductions for the year. they might not be necessary.

Will let you know once they're sorted.

Thanks  
Brett

*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!](#)*



**Brett Dunn | Partner**

☎ 07 3422 8000

✉ PO Box 83, Mount Gravatt Q 4122

📍 Lvl 1, 1454 Logan Rd Mt Gravatt Central Q 4122

🌐 [www.marshTincknell.com.au](http://www.marshTincknell.com.au)

[Pay your bill online](#)

[Connect with us](#)

Marsh Tincknell Pty Ltd ACN 137 316 815

Liability limited by a scheme approved under Professional Standards legislation

Disclaimer: If the information in this email relates to your business, personal or financial affairs, it is either factual or was in relation to taxation advice, therefore does not constitute financial product advice and should not be relied upon as financial product advice. Taxation is only one of the matters that you need to consider when making a decision and none of the information provided takes into account your personal objectives, financial situation or needs. You must determine whether the information is appropriate in terms of your particular circumstances. For financial product advice that takes account of your particular objectives, financial situation or needs, you should consider seeking financial advice from an Australian Financial Services licensee before making a financial decision.

Please note that collection, use and storage of all information held by the MT Group is governed by our Privacy Policy. This email and any attachment are confidential. If you are not the intended recipient, please notify Marsh Tincknell by reply email and delete this email. Please note that you must not access or use this email or any information in it. Marsh Tincknell accepts no liability for viruses in this email or in any attachment to it.

---

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

**Sent:** Monday, 10 October 2022 4:01 PM

**To:** Brett Dunn <BrettD@mtaccountants.com.au>

**Subject:** DUN02S - 22FY super contributions

Hi Bretty,

For DUN02S 22FY, could you please:

1. Confirm Barry meets the work test?
2. Confirm you are happy with the attached draft super contributions?
  - a. If not, please advise on how you would like this treated?
  - b. If so, please provide a copy of his tax return showing the deduction.