

THE WEEKES SUPERANNUATION FUND
Contribution Caps
For the Period From 1 July 2020 to 30 June 2021

Mr Daniel Weekes

Date of Birth: 28 Oct 1962
Age: 58 (at 30/06/2021)
Status: Member may be eligible for the bring forward rule, certain conditions apply

Contributions Summary

		Concessional	Non-Concessional
Prior Year Contributions			
The 'Bring Forward Rule' was NOT triggered in the previous 2 years			
3-year cap in effect from previous years			N/A
Total non-concessional contributions in previous 2 years			N/A
Current Year Contributions			
	Note	Concessional	Non-Concessional
Caps	1,2	25,000.00	100,000.00
Cumulative Available Unused Cap	3	749.88	0.00
Contributions made (to this fund)	4	6,701.19	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		6,701.19	0.00
Amount above caps	5	0.00	0.00
Available		19,048.69	100,000.00

Notes

- 1 . 'Bring Forward Rule' MAY be triggered this year
- 2 . Non-concessional cap shown applies to current year only
- 3 . Member may be eligible to make catch-up concessional contributions
- 4 . Excludes any unmatched deposits
- 5 . Any excess concessional contributions are treated as non-concessional

Contributions Breakdown

<u>Income Type</u>	<u>Contribution Type</u>	<u>Amount</u>
Concessional	Employer	6,701.19
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	6,701.19
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
22/07/2020	Employer Mandated	4,143.47			manual
19/10/2020	Employer Mandated	1,096.17			manual
25/01/2021	Employer Mandated	1,278.86			manual
23/04/2021	Employer Mandated	182.69			manual
Totals:		6,701.19			

THE WEEKES SUPERANNUATION FUND
Contribution Caps
For the Period From 1 July 2020 to 30 June 2021

Mrs Fiona Weekes

Date of Birth: 21 May 1973
Age: 48 (at 30/06/2021)
Status: Member may be eligible for the bring forward rule, certain conditions apply

Contributions Summary

		Concessional	Non-Concessional
Prior Year Contributions			
The 'Bring Forward Rule' was NOT triggered in the previous 2 years			
3-year cap in effect from previous years			N/A
Total non-concessional contributions in previous 2 years			N/A
Current Year Contributions	Note	Concessional	Non-Concessional
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	Foreign superannuation fund	0.00
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	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
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