

N & K MULLER SUPERANNUATION FUND
Contribution Caps
For the Period From 1 July 2021 to 30 June 2022

Mr Neil Muller

Date of Birth: 31 Mar 1956
Age: 66 (at 30/06/2022)
Status: Member may be eligible for the bring forward rule, certain conditions apply

Contributions Summary**Prior Year Contributions**

The 'Bring Forward Rule' was triggered in the previous year

3-year cap in effect from previous year	300,000.00
Total non-concessional contributions in previous year	300,000.00

Current Year Contributions	Note	Concessional	Non-Concessional
Caps	1,2	27,500.00	0.00
Cumulative Available Unused Cap	3	0.00	0.00
Contributions made (to this fund)	4	27,500.00	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		27,500.00	0.00
Amount above caps	5	0.00	0.00
Available		0.00	0.00

Notes

- 1 . 'Bring Forward Rule' was triggered in previous year
- 2 . Non-concessional cap shown is the total for the current year and next year
- 3 . Total Superannuation Balance was \$500,000 or more at 30 June 2021, member not 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	0.00
	Personal	27,500.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	27,500.00
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 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
	Total Other contributions	0.00

Transactions

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
02/02/2022	Personal	27,500.00			manual
	Totals:	27,500.00			

N & K MULLER SUPERANNUATION FUND
Contribution Caps
For the Period From 1 July 2021 to 30 June 2022

Mrs Karen Muller

Date of Birth: 10 Oct 1957
Age: 64 (at 30/06/2022)
Status: Member may be eligible for the bring forward rule, certain conditions apply

Contributions Summary

	Non-Concessional
Prior Year Contributions	
The 'Bring Forward Rule' was triggered in the previous year	
3-year cap in effect from previous year	300,000.00
Total non-concessional contributions in previous year	300,000.00

Current Year Contributions	Note	Concessional	Non-Concessional
Caps	1,2	27,500.00	0.00
Cumulative Available Unused Cap	3	0.00	0.00
Contributions made (to this fund)	4	27,500.00	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		27,500.00	0.00
Amount above caps	5	0.00	0.00
Available		0.00	0.00

Notes

- 1 . 'Bring Forward Rule' was triggered in previous year
- 2 . Non-concessional cap shown is the total for the current year and next year
- 3 . Total Superannuation Balance was \$500,000 or more at 30 June 2021, member not eligible to make catch-up concessional contributions
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- 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	0.00
	Personal	27,500.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	27,500.00
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 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
	Total Other contributions	0.00

Transactions

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
02/02/2022	Personal	27,500.00			manual
	Totals:	27,500.00			

Elizabeth Meiklejohn

Chaitra Ramesh

From: Alex Robertson <AlexR@mtaccountants.com.au>
Sent: Friday, 22 July 2022 7:47 AM
To: Stephanie Natividad; Chaitra Ramesh
Cc: Elizabeth Meiklejohn
Subject: FW: N & K Muller Superannuation Fund - Rent & contribution confirmation
Attachments: DUR02S - Rent received.pdf; DUR02S - Contribution ledger.pdf; DUR02S - Notice of intent to claim.pdf

Hi Steph & Chai

Chai, the personal concessional contributions are correct and Neil & Karen will be claiming these amounts in their personal tax returns.

Steph, can you please check Duralloy's ledger and advise Chai.

Cheers

Alex

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Alex Robertson | Director

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From: Chaitra Ramesh <ChaitraR@virtusuper.com.au>
Sent: Thursday, 21 July 2022 9:10 AM
To: Alex Robertson <AlexR@mtaccountants.com.au>
Cc: Virtu - ElizabethM - External <Elizabethm@virtusuper.com.au>
Subject: N & K Muller Superannuation Fund - Rent & contribution confirmation

Good morning Alex,

I hope you are doing well.

I am working with Liz on N & K Muller Superannuation Fund (22FY), and I would like to confirm the super contributions and rent received.

We have the following –

Personal concessional

- a. Neil - \$27,500
- b. Karen - \$27,500

Will they be claiming this in their personal returns? I have also attached the draft notice of intent to claim for your perusal.

Rent received

- a. 15-17 Kabi Circuit, Deception Bay - \$185,000
- b. 19-21 Kabi Circuit, Deception Bay - \$45,000

Could you please email me the rent ledger for the above amounts?

Thank you so much.

Regards,
Chai



Chaitra Ramesh

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