



# CNS AUTOMATION SUPERANNUATION FUND

## Contribution Caps

For the Period From 1 July 2021 to 30 June 2022

**Mr Jose Dias**

**Date of Birth:** 20 Oct 1960

**Age:** 61 (at 30/06/2022)

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

### Contributions Summary

#### Prior Year Contributions

#### Non-Concessional

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	27,500.00	110,000.00
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	110,000.00

#### Notes

1 . 'Bring Forward Rule' MAY be triggered this year

2 . Non-concessional cap shown applies to current year only

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>
<b>Concessional</b>	Employer	7,000.00
	Personal	20,500.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	<b>Contributions as allocated</b>	<b>27,500.00</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
12/05/2022	Employer Mandated	7,000.00			manual
12/05/2022	Personal	11,250.00			manual
13/05/2022	Personal	9,250.00			manual

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# **CNS AUTOMATION SUPERANNUATION FUND**

## **Contribution Caps**

**For the Period From 1 July 2021 to 30 June 2022**

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**Mr Jose Dias**

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<b>Totals:</b>	<b>27,500.00</b>
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# CNS AUTOMATION SUPERANNUATION FUND

## Contribution Caps

For the Period From 1 July 2021 to 30 June 2022

**Mrs Annette Dias**

**Date of Birth:** 03 Mar 1958

**Age:** 64 (at 30/06/2022)

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

### Contributions Summary

#### Prior Year Contributions

**Non-Concessional**

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	27,500.00	110,000.00
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	110,000.00

#### Notes

1 . 'Bring Forward Rule' MAY be triggered this year

2 . Non-concessional cap shown applies to current year only

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>
<b>Concessional</b>	Employer	2,000.00
	Personal	25,500.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	<b>Contributions as allocated</b>	<b>27,500.00</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
12/05/2022	Employer Mandated	2,000.00			manual
12/05/2022	Personal	1,000.00			manual
12/05/2022	Personal	11,250.00			manual

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## CNS AUTOMATION SUPERANNUATION FUND

### Contribution Caps

For the Period From 1 July 2021 to 30 June 2022

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#### Mrs Annette Dias

13/05/2022	Personal	13,250.00	manual
<b>Totals:</b>		<b>27,500.00</b>	

## Rachel Green-Luther

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**From:** Jie Li <jiel@mtaccountants.com.au>  
**Sent:** Tuesday, 29 November 2022 11:54 AM  
**To:** Rachel Green-Luther  
**Cc:** Kylie Greene  
**Subject:** RE: DIA01S - Dias Superannuation fund - 22FY Super cont

Hi Rachel:

Thank you for sending this through. 😊

Can you please process super as follow:

Joes: \$7,000 Employer \$20,500 as personal super contribution  
Annette: \$2,000 Employer \$25,500 as personal super contribution

Kind Regards,  
Jie

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*



**Jie Li** | Accountant

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**From:** Rachel Green-Luther <RachelG@virtusuper.com.au>  
**Sent:** Wednesday, 23 November 2022 1:10 PM  
**To:** Jie Li <jiel@mtaccountants.com.au>  
**Cc:** Kylie Greene <kylied@mtaccountants.com.au>  
**Subject:** RE: DIA01S - Dias Superannuation fund - 22FY Super cont

Hi Jie,

Please find attached the draft super contributions for 22FY.

Could you please advise the treatment for Joe and Annette:


- Employer
- Personal Concessional
- Personal Non-Concessional


Happy to change.

We still have not processed the 22FY accounts but it is unlikely the super contributions won't change.

Any questions, please let me know.


Cheers,  
Rach





**Rachel Green-Luther** (she/her) SSA CPA 

Senior Accountant

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**From:** Rachel Green-Luther  
**Sent:** Thursday, 3 November 2022 1:00 PM  
**To:** Jie Li <[jjel@mtaccountants.com.au](mailto:jjel@mtaccountants.com.au)>  
**Cc:** Kylie Greene <[kylied@mtaccountants.com.au](mailto:kylied@mtaccountants.com.au)>  
**Subject:** RE: Dias Superannuation fund - 22FY

Hi Jie,

We are waiting on the client for missing bank transactions so we will not be able to confirm this until we have the information.

Currently, we have no confirmed super contributions.

Cheers,  
Rach

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**From:** Jie Li <[jiel@mtaccountants.com.au](mailto:jiel@mtaccountants.com.au)>  
**Sent:** Thursday, 3 November 2022 10:21 AM  
**To:** Rachel Green-Luther <[RachelG@virtusuper.com.au](mailto:RachelG@virtusuper.com.au)>  
**Cc:** Kylie Greene <[kylie@mtaccountants.com.au](mailto:kylie@mtaccountants.com.au)>  
**Subject:** Dias Superannuation fund

Hi Rachel:

We are working on EOY 2022 of ASFRAN Pty Ltd, Can you please send us the Balance detail of Dias Super Fund to confirm what they actually contributed to their super fund.  
Much appreciated.

Kind Regards,  
Jie Li

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](#)!



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**Jie Li** | Accountant

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