

**The Adams Family Superannuation Fund**  
**Contribution Caps**  
**For the Period From 1 July 2021 to 30 June 2022**

**Mr Timothy Adams**

**Date of Birth:** 12 May 1975  
**Age:** 47 (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 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

<b>Current Year Contributions</b>	<b>Note</b>	<b>Concessional</b>	<b>Non-Concessional</b>
Caps	1,2	27,500.00	110,000.00
Cumulative Available Unused Cap	3	52,981.96	0.00
Contributions made (to this fund)	4	25,370.81	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		25,370.81	0.00
Amount above caps	5	0.00	0.00
Available		55,111.15	110,000.00

**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>
<b>Concessional</b>	Employer	25,370.81
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	<b>Contributions as allocated</b>	<b>25,370.81</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**

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**Mr Timothy Adams**

<b>Date</b>	<b>Contribution Type</b>	<b>Concessional</b>	<b>Non-Concessional</b>	<b>Other</b>	<b>Source</b>
16/08/2021	Employer Mandated	2,166.67			manual
16/09/2021	Employer Mandated	2,166.67			manual
20/10/2021	Employer Mandated	2,166.67			manual
17/11/2021	Employer Mandated	2,166.67			manual
17/12/2021	Employer Mandated	1,496.44			smsfdataflow
17/12/2021	Employer Voluntary	670.23			smsfdataflow
17/01/2022	Employer Mandated	1,496.44			smsfdataflow
17/01/2022	Employer Voluntary	670.23			smsfdataflow
17/02/2022	Employer Mandated	1,496.44			smsfdataflow
17/02/2022	Employer Voluntary	670.23			smsfdataflow
14/03/2022	Employer Mandated	2,899.12			smsfdataflow
14/03/2022	Employer Voluntary	670.23			smsfdataflow
21/04/2022	Employer Mandated	1,541.36			smsfdataflow
21/04/2022	Employer Voluntary	670.23			smsfdataflow
19/05/2022	Employer Mandated	1,541.36			smsfdataflow
19/05/2022	Employer Voluntary	670.23			smsfdataflow
17/06/2022	Employer Mandated	1,541.36			smsfdataflow
17/06/2022	Employer Voluntary	670.23			smsfdataflow
<b>Totals:</b>		<b>25,370.81</b>			

**The Adams Family Superannuation Fund**  
**Contribution Caps**  
**For the Period From 1 July 2021 to 30 June 2022**

**Mrs Heather Adams**

**Date of Birth:** 10 Dec 1973  
**Age:** 48 (at 30/06/2022)  
**Status:** Member may be eligible for the bring forward rule, certain conditions apply

**Contributions Summary**

<b>Prior Year Contributions</b>		<b>Non-Concessional</b>	
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	
<b>Current Year Contributions</b>	<b>Note</b>	<b>Concessional</b>	<b>Non-Concessional</b>
Caps	1,2	27,500.00	110,000.00
Cumulative Available Unused Cap	3	57,505.13	0.00
Contributions made (to this fund)	4	23,581.18	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		23,581.18	0.00
Amount above caps	5	0.00	0.00
Available		61,423.95	110,000.00

**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>
<b>Concessional</b>	Employer	23,581.18
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	<b>Contributions as allocated</b>	<b>23,581.18</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**

<b>Date</b>	<b>Contribution Type</b>	<b>Concessional</b>	<b>Non-Concessional</b>	<b>Other</b>	<b>Source</b>
06/07/2021	Employer Mandated	1,157.84			manual
19/07/2021	Employer Mandated	1,913.12			manual
09/08/2021	Employer Mandated	1,197.74			manual
31/08/2021	Employer Mandated	1,597.74			manual

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**Mrs Heather Adams**

07/10/2021	Employer Mandated	1,597.74	manual
09/11/2021	Employer Mandated	2,396.61	manual
06/12/2021	Employer Mandated	797.74	smsfdataflow
06/12/2021	Employer Voluntary	800.00	smsfdataflow
21/02/2022	Employer Mandated	797.74	smsfdataflow
21/02/2022	Employer Mandated	937.34	smsfdataflow
21/02/2022	Employer Voluntary	800.00	smsfdataflow
21/02/2022	Employer Voluntary	800.00	smsfdataflow
04/05/2022	Employer Mandated	797.74	smsfdataflow
04/05/2022	Employer Mandated	797.74	smsfdataflow
04/05/2022	Employer Voluntary	800.00	smsfdataflow
04/05/2022	Employer Voluntary	800.00	smsfdataflow
23/05/2022	Employer Mandated	1,196.61	smsfdataflow
23/05/2022	Employer Voluntary	1,200.00	smsfdataflow
06/06/2022	Employer Mandated	797.74	smsfdataflow
06/06/2022	Employer Voluntary	800.00	smsfdataflow
30/06/2022	Employer Mandated	797.74	smsfdataflow
30/06/2022	Employer Voluntary	800.00	smsfdataflow
<b>Totals:</b>		<b>23,581.18</b>	