

Greg & Dawn Makeham Superannuation Fund
Contribution Caps
For the Period From 1 July 2020 to 30 June 2021

Mr Gregory Makeham

Date of Birth: 27 Jul 1954

Age: 66 (at 30/06/2021)

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

Contributions Summary

Non-Concessional

Prior Year Contributions

Contributions for the previous 2 years are not confirmed

3-year cap in effect from previous years

Unknown

Total non-concessional contributions in previous 2 years

Unknown

Current Year Contributions	Note	Concessional	Non-Concessional
Caps	1	25,000.00	100,000.00
Cumulative Available Unused Cap	2	0.00	0.00
Contributions made (to this fund)	3	15,750.00	9,250.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		15,750.00	9,250.00
Amount above caps	4	0.00	0.00
Available		9,250.00	90,750.00

Notes

- 1 . Non-concessional cap shown does NOT take prior year 'Bring Forward Rule' usage into account
- 2 . Total Superannuation Balance was \$500,000 or more at 30 June 2020, 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>
Concessional	Employer	0.00
	Personal	15,750.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	15,750.00
NonConcessional	Personal	9,250.00
	Spouse	0.00
	Child	0.00
	Transfers from reserve	0.00
	Foreign superannuation fund	0.00
	Contributions as allocated	9,250.00
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
	Total Other contributions	0.00

Transactions

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
05/05/2021	Personal	7,500.00			manual
11/05/2021	Personal	8,250.00			manual
11/05/2021	Personal		1,750.00		manual
17/05/2021	Personal		7,500.00		manual
Totals:		15,750.00	9,250.00		

Greg & Dawn Makeham Superannuation Fund
Contribution Caps
For the Period From 1 July 2020 to 30 June 2021

Mrs Dawn Makeham

Date of Birth: 17 Jun 1954
Age: 67 (at 30/06/2021)
Status: Member must meet work test criteria, other conditions apply

Contributions Summary

Non-Concessional

Prior Year Contributions

Contributions for the previous 2 years are not confirmed
 3-year cap in effect from previous years
 Total non-concessional contributions in previous 2 years

Unknown

Unknown

Current Year Contributions	Note	Concessional	Non-Concessional
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Available		9,250.00	90,750.00

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Contributions Breakdown

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Concessional	Employer	0.00
	Personal	15,750.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	15,750.00
NonConcessional	Personal	9,250.00
	Spouse	0.00
	Child	0.00
	Transfers from reserve	0.00
	Foreign superannuation fund	0.00
	Contributions as allocated	9,250.00
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
	Total Other contributions	0.00

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