

**Chalna Super Fund**  
**Contribution Caps**  
**For the Period From 1 July 2020 to 30 June 2021**

**Mr Murdo MacLeod**

**Date of Birth:** 5 Feb 1958  
**Age:** 63 (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  
 Total non-concessional contributions in previous 2 years

Unknown

Unknown

Current Year Contributions	Note	Concessional	Non-Concessional
Caps	1	25,000.00	100,000.00
Cumulative Available Unused Cap	2	50,000.00	0.00
Contributions made (to this fund)	3	4,899.29	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		4,899.29	0.00
Amount above caps	4	0.00	0.00
Available		70,100.71	100,000.00

**Notes**

- 1 . Non-concessional cap shown does NOT take prior year 'Bring Forward Rule' usage into account
- 2 . Member may be 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>
<b>Concessional</b>	Employer	0.00
	Personal	4,899.29
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	<b>Contributions as allocated</b>	<b>4,899.29</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	371,524.00
	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
	<b>Total Other contributions</b>	<b>371,524.00</b>

**Transactions**

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
04/06/2021	CGT small business retirement exemption			371,524.00	manual
29/06/2021	Personal	4,899.29			manual
<b>Totals:</b>		<b>4,899.29</b>		<b>371,524.00</b>	

**Chalna Super Fund**  
**Contribution Caps**  
**For the Period From 1 July 2020 to 30 June 2021**

**Mrs Ruth Davies**

**Date of Birth:** 16 Mar 1967  
**Age:** 54 (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	25,000.00	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		25,000.00	0.00
Amount above caps	4	0.00	0.00
Available		0.00	100,000.00

**Notes**

- 1 . Non-concessional cap shown does NOT take prior year 'Bring Forward Rule' usage into account
- 2 . Concessional contribution cap has been used up in prior year(s), member has no unused concessional contribution cap carry forward
- 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>
<b>Concessional</b>	Employer	0.00
	Personal	25,000.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	<b>Contributions as allocated</b>	<b>25,000.00</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	371,524.00
	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
	<b>Total Other contributions</b>	<b>371,524.00</b>

**Transactions**

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
23/04/2021	Personal	10,000.00			manual
27/04/2021	Personal	10,000.00			manual
06/05/2021	CGT small business retirement exemption			25,000.00	manual
12/05/2021	CGT small business retirement exemption			50,000.00	manual
14/05/2021	CGT small business retirement exemption			50,000.00	manual

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**Mrs Ruth Davies**

<b>Date</b>	<b>Contribution Type</b>	<b>Concessional</b>	<b>Non-Concessional</b>	<b>Other</b>	<b>Source</b>
28/05/2021	CGT small business retirement exemption			246,524.00	manual
29/06/2021	Personal	5,000.00			manual
	<b>Totals:</b>	<b>25,000.00</b>		<b>371,524.00</b>	