



**SJ & JM Dixon Superannuation Fund**  
**Contribution Caps**  
**For the Period From 1 July 2020 to 30 June 2021**

**Mr Stephen Dixon**

Client has confirmed super contributions and work test.

**Date of Birth:** 17 Aug 1949  
**Age:** 71 (at 30/06/2021)  
**Status:** Only employer or personal contributions allowed subject to the work test

**Contributions Summary**

**Non-Concessional**

**Prior Year Contributions**

The 'Bring Forward Rule' was unavailable in previous 2 years; member was 65 or older  
3-year cap in effect from previous years  
Total non-concessional contributions in previous 2 years

N/A

N/A

Current Year Contributions	Note	Concessional	Non-Concessional
Caps	1	25,000.00	0.00
Cumulative Available Unused Cap	2	0.00	0.00
Contributions made (to this fund)	3	24,688.01	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		24,688.01	0.00
Amount above caps	4	0.00	0.00
Available		311.99	0.00

**Notes**

- 1 . Total Superannuation Balance was \$1.6 million or more at 30 June 2020, member not eligible to make Non-Concessional Contributions
- 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>
<b>Concessional</b>	Employer	24,688.01
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	<b>Contributions as allocated</b>	<b>24,688.01</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 exception	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
	<b>Total Other contributions</b>	<b>0.00</b>

**Transactions**

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
07/07/2020	Employer Mandated	1,846.16			manual
21/07/2020	Employer Mandated	50.27			manual
07/08/2020	Employer Mandated	2,307.70			manual
27/08/2020	Employer Mandated	61.86			manual
09/09/2020	Employer Mandated	1,846.16			manual
07/10/2020	Employer Mandated	2,307.70			manual

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**For the Period From 1 July 2020 to 30 June 2021**

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**Mr Stephen Dixon**

<b>Date</b>	<b>Contribution Type</b>	<b>Concessional</b>	<b>Non-Concessional</b>	<b>Other</b>	<b>Source</b>
20/10/2020	Employer Mandated	112.04			manual
09/11/2020	Employer Mandated	1,846.16			manual
07/12/2020	Employer Mandated	1,846.16			manual
21/12/2020	Employer Mandated	125.21			manual
14/01/2021	Employer Mandated	2,307.70			manual
21/01/2021	Employer Mandated	57.97			manual
08/02/2021	Employer Mandated	1,846.16			manual
23/02/2021	Employer Mandated	54.88			manual
08/03/2021	Employer Mandated	1,846.16			manual
08/04/2021	Employer Mandated	2,307.70			manual
20/04/2021	Employer Mandated	109.75			manual
10/05/2021	Employer Mandated	1,846.16			manual
20/05/2021	Employer Mandated	58.75			manual
07/06/2021	Employer Mandated	1,846.16			manual
21/06/2021	Employer Mandated	57.20			manual
<b>Totals:</b>		<b>24,688.01</b>			

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**SJ & JM Dixon Superannuation Fund**  
**Contribution Caps**  
**For the Period From 1 July 2020 to 30 June 2021**

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**Mrs Janet Dixon**

**Date of Birth:** 6 Jul 1949  
**Age:** 71 (at 30/06/2021)  
**Status:** Only employer or personal contributions allowed subject to the work test

**Contributions Summary**

**Non-Concessional**

**Prior Year Contributions**

The 'Bring Forward Rule' was unavailable in previous 2 years; member was 65 or older  
3-year cap in effect from previous years  
Total non-concessional contributions in previous 2 years

N/A  
N/A

<b>Current Year Contributions</b>	<b>Note</b>	<b>Concessional</b>	<b>Non-Concessional</b>
Caps	1,2	25,000.00	100,000.00
Cumulative Available Unused Cap	3	0.00	0.00
Contributions made (to this fund)	4	0.00	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		0.00	0.00
Amount above caps	5	0.00	0.00
Available		25,000.00	100,000.00

**Notes**

- 1 . 'Bring Forward Rule' can NOT be triggered this year; member was 67 or older
- 2 . Non-concessional cap shown applies to current year only
- 3 . Total Superannuation Balance was \$500,000 or more at 30 June 2020, member not eligible to make catch-up concessional contributions
- 4 . Excludes any unmatched deposits
- 5 . Any excess concessional contributions are treated as non-concessional

**SJ and JM Dixon Superannation Fund - Contributions****2020-21**

Member	Employer	Employee Contributions	Date	Member Contributions	Date	Rollover from other Funds	Date	Total Member Contribution
Janet Dixon		nil				Nil		
Total				\$ -		\$ -		\$ -

Stephen Dixon	EZI Roll	\$ 687.93				Nil		
	Gliderol International	\$ 24,000.08						
Total		\$ 24,688.01		\$ -		\$ -		\$ 24,688.01

EZI Roll Date	CBA 10668614 Amount
21.7.20	\$ 50.27
27.8.20	\$ 61.86
20.10.20	\$ 112.04
21.12.20	\$ 125.21
21.1.21	\$ 57.97
23.2.21	\$ 54.88
20.4.21	\$ 109.75
20.5.21	\$ 58.75
21.6.21	\$ 57.20

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\$ 687.93

Gliderol Date	CBA 10668614 Amount
7.7.20	\$ 1,846.16
7.8.20	\$ 2,307.70
9.9.20	\$ 1,846.16
7.10.20	\$ 2,307.70
9.11.20	\$ 1,846.16
7.12.20	\$ 1,846.16
14.1.21	\$ 2,307.70
8.2.21	\$ 1,846.16
8.3.21	\$ 1,846.16
8.4.21	\$ 2,307.70
10.5.21	\$ 1,846.16
7.6.21	\$ 1,846.16

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\$ 24,000.08

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\$ 24,688.01

Steve Dixon  
16/12 Esperance Court  
Cleveland Qld 4163

6 July 2020

The Trustees  
SJ & JM Dixon Superannuation Fund  
Po Box 1795  
Cleveland Qld 4163

Dear Trustees

**ELIGIBILITY TO MAKE SUPERANNUATION CONTRIBUTIONS AFTER AGE 65**

I declare that:

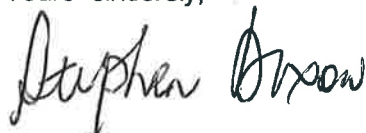
- a) I have been "gainfully employed" for at least 40 hours in a period of not more than 30 consecutive days for the financial year ended 30 June 2021. I confirm that this work test has been satisfied prior to the first contribution being made.

*"Gainfully Employed" means being employed or self employed for gain in any business, trade, profession, vocation, calling, operation or employment. "Gain or reward" is the receipt of remuneration such as wages, business income, bonuses and commissions in return for personal exertion from these activities. It does not include the passive gaining of income, such as receipt of rent or dividends.*

OR

- b) The only contributions made during the year were compulsory contributions made under an award agreement or the Superannuation Guarantee provisions.

Yours sincerely,



Steve Dixon  
Member

**SIGN**