

The Ogle Family Superannuation Fund
Contribution Caps
For the Period From 1 July 2020 to 30 June 2021

Mrs Helen Ogle

Date of Birth: 30 May 1951
Age: 70 (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 N/A
 Total non-concessional contributions in previous 2 years N/A

| Current Year Contributions | Note | Concessional | Non-Concessional |
|-------------------------------------|------|--------------|------------------|
| Caps | 1,2 | 25,000.00 | 100,000.00 |
| Cumulative Available Unused Cap | 3 | 0.00 | 0.00 |
| Contributions made (to this fund) | 4 | 2,716.59 | 0.00 |
| Contributions made (to other funds) | | 0.00 | 0.00 |
| Contributions as allocated | | 2,716.59 | 0.00 |
| Amount above caps | 5 | 0.00 | 0.00 |
| Available | | 22,283.41 | 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

Contributions Breakdown

| <u>Income Type</u> | <u>Contribution Type</u> | <u>Amount</u> |
|------------------------|---|-----------------|
| Concessional | Employer | 0.00 |
| | Personal | 2,716.59 |
| | Family and friends | 0.00 |
| | Foreign superannuation fund | 0.00 |
| | Transfers from reserve | 0.00 |
| | Contributions as allocated | 2,716.59 |
| NonConcessional | Personal | 0.00 |
| | Spouse | 0.00 |
| | Child | 0.00 |
| | Transfers from reserve | 0.00 |
| | Foreign superannuation fund | 0.00 |
| | Contributions as allocated | 0.00 |
| 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 |
|----------------|-------------------|-----------------|------------------|-------|--------|
| 30/10/2020 | Personal | 2,716.59 | | | manual |
| Totals: | | 2,716.59 | | | |