

Skeen Superannuation Fund
Contribution Caps
For the Period From 1 July 2020 to 30 June 2021 *Elizabeth Meiklejohn*

Mr Mathew Skeen

Date of Birth: 15 Nov 1979
Age: 41 (at 30/06/2021)
Status: Member may be eligible for the bring forward rule, certain conditions apply

Contributions Summary

		Non-Concessional	
Prior Year Contributions			
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	
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	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	5	0.00	0.00
Available		0.00	100,000.00

Notes

- 1 . 'Bring Forward Rule' MAY be triggered this year
- 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	25,000.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	25,000.00
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 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
	Total Other contributions	0.00

Transactions

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
08/10/2020	Personal	25,000.00			manual
Totals:		25,000.00			

Brenda Wishey

From: Brenda Wishey
Sent: Thursday, 9 December 2021 8:08 AM
To: Brett Dunn
Subject: RE: Matt Mabin & Mat Skeen
Attachments: s290-170_-_Notice_of_Intent_to_Claim - Matthew Mabin.pdf; s290-170_-_Notice_of_Intent_to_Claim - Mathew Skeen.pdf

Good morning Brett

Both members made the \$25,000 personal concessional contributions to their respective SMSFs for the 2020-2021 year.

Please find attached the NOI's for your records.

Kind regards
Brenda

From: Brett Dunn <BrettD@mtaccountants.com.au>
Sent: Wednesday, 8 December 2021 2:54 PM
To: Brenda Wishey <BrendaW@virtusuper.com.au>
Subject: Matt Mabin & Mat Skeen

Hi Brenda,

Just reviewing the 2021 EOY for Mat Skeen and Matt Mabin. Can you please confirm they both contributed 25k into super. Have you issued the NOI to claim forms?

Ta

PS – We are always open for new business so please pass on our details to any friends, family or colleagues whom would benefit from our services.



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Brett Dunn | Partner

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We are closed from 5pm on Tuesday 21st December until Tuesday 4th January.

We wish you a very Merry Christmas and a Happy New Year!

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