

Darcy Kennedy Service Trust Superannuation Benefit
Contribution Caps
For the Period From 1 July 2018 to 30 June 2019

Mr Michael Kennedy

Date of Birth: 3 Dec 1953
Age: 65 (at 30/06/2019)
Status: Member must meet work test criteria, other conditions apply

Contributions Summary

		Non-Concessional	
Prior Year Contributions			
The 'Bring Forward Rule' was triggered two years ago			
3-year cap in effect from previous 2 years		380,000.00	
Total non-concessional contributions in previous 2 years (transitional arrangements apply)		540,000.00	
Current Year Contributions			
	Note	Concessional	Non-Concessional
Caps	1, 2	25,000.00	0.00
Contributions made (to this fund)	3	24,704.75	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		24,704.75	0.00
Amount above caps	4	0.00	0.00
Available		295.25	0.00

Notes

1. 'Bring Forward Rule' was triggered 2 years ago
2. Non-concessional cap shown applies to current year only
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	22,944.75
	Personal	1,760.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	24,704.75
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	300,000.00
	Total Other contributions	300,000.00

Transactions

Date	Contribution Type	Concessional	Non-Concessional	Other
23/08/2018	Employer	1,525.13		
24/09/2018	Employer	2,416.10		
17/10/2018	Employer	1,610.73		
14/11/2018	Employer	1,610.74		
12/12/2018	Employer	1,610.74		
23/01/2019	Employer	1,610.74		
19/02/2019	Employer	2,273.41		
6/03/2019	Downsizer Contribution			300,000.00
19/03/2019	Employer	1,610.74		

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Date	Contribution Type	Concessional	Non-Concessional	Other
8/04/2019	Employer	1,845.06		
16/04/2019	Employer	1,610.74		
8/05/2019	Employer	194.22		
16/05/2019	Employer	1,610.72		
30/05/2019	Personal	1,760.00		
10/06/2019	Employer	194.22		
12/06/2019	Employer	1,610.74		
25/06/2019	Employer	1,610.72		
	Totals:	24,704.75		300,000.00

Darcy Kennedy Service Trust Superannuation Benefit
Contribution Caps
For the Period From 1 July 2018 to 30 June 2019

Mrs Kaylene Kennedy

Date of Birth: 28 Mar 1954
Age: 65 (at 30/06/2019)
Status: Member must meet work test criteria, other conditions apply

Contributions Summary

		Non-Concessional	
Prior Year Contributions			
The bring Forward Rule IS being triggered this year			
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	300,000.00
Contributions made (to this fund)	3	0.00	300,000.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		0.00	300,000.00
Amount above caps	4	0.00	0.00
Available		25,000.00	0.00

Notes

1. The bring Forward Rule IS being triggered this year
2. Non-concessional cap shown is the total for the current year and next two years
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	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	0.00
NonConcessional	Personal	300,000.00
	Spouse	0.00
	Child	0.00
	Transfers from reserve	0.00
	Foreign superannuation fund	0.00
	Contributions as allocated	300,000.00
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
18/03/2019	Personal		300,000.00	
	Totals:		300,000.00	