

John Barkas Superannuation Fund
Contribution Caps
For the Period From 1 July 2020 to 30 June 2021

Mr John Barkas

Date of Birth: 25 Apr 1950
Age: 71 (at 30/06/2021)
Status: Only employer or personal contributions allowed subject to the work test

Contributions Summary

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	33,200.00	0.00
Contributions made (to this fund)	4	15,150.00	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		15,150.00	0.00
Amount above caps	5	0.00	0.00
Available		43,050.00	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 . Member may be 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	15,150.00
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	15,150.00
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 exemption	0.00
	CGT small business retirement exemption	0.00
	Government Co-Contributions	145.25
	Directed termination payment (taxed)	0.00
	Directed termination payment (untaxed)	0.00
	Personal injury election	0.00
	Downsizer Contribution	0.00
	Total Other contributions	145.25

Transactions

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
31/07/2020	Employer Mandated	2,050.00			manual
31/07/2020	Employer Voluntary	1,000.00			manual
14/08/2020	Employer Voluntary	1,000.00			manual
27/08/2020	Employer Voluntary	1,000.00			manual
09/09/2020	Employer Voluntary	1,000.00			manual
23/09/2020	Employer Voluntary	1,000.00			manual
27/04/2021	Employer Mandated	1,000.00			manual

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28/04/2021	Employer Voluntary	1,000.00			manual
10/06/2021	Government Co-Contributions			145.25	manual
30/06/2021	Employer Mandated	1,600.00			manual
30/06/2021	Employer Voluntary	4,500.00			manual
	Totals:	15,150.00		145.25	