

**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**

**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	1,2	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>
<b>Concessional</b>	Employer	15,150.00
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	<b>Contributions as allocated</b>	<b>15,150.00</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 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
	<b>Total Other contributions</b>	<b>145.25</b>

**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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<b>Date</b>	<b>Contribution Type</b>	<b>Concessional</b>	<b>Non-Concessional</b>	<b>Other</b>	<b>Source</b>
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
<b>Totals:</b>		<b>15,150.00</b>		<b>145.25</b>	