

THE ALEX SUPERANNUATION FUND
Contribution Caps
For the Period From 1 July 2021 to 30 June 2022

Brenda Wishey

Mr Michael Polkinghorne

Date of Birth: 08 Jun 1981 See C1a
Age: 41 (at 30/06/2022)
Status: Member may be eligible for the bring forward rule, certain conditions apply

Contributions Summary

Prior Year Contributions		Non-Concessional	
Contributions for the previous 2 years are not confirmed			
3-year cap in effect from previous years		Unknown	
Total non-concessional contributions in previous 2 years		Unknown	
Current Year Contributions	Note	Concessional	Non-Concessional
Caps	1	27,500.00	110,000.00
Cumulative Available Unused Cap	2	32,679.78	0.00
Contributions made (to this fund)	3	17,069.52	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		17,069.52	0.00
Amount above caps	4	0.00	0.00
Available		43,110.26	110,000.00

Notes

- 1 . Non-concessional cap shown does NOT take prior year 'Bring Forward Rule' usage into account
- 2 . Member may be eligible to make catch-up concessional contributions
- 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	17,069.52
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	
NonConcessional	Personal	0.00
	Spouse	0.00
	Child	0.00
	Transfers from reserve	0.00
	Foreign superannuation fund	0.00
	Contributions as allocated	
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
	COVID-19 Re-Contribution	0.00
	Total Other contributions	

Transactions

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
06/10/2021	Employer Mandated	4,595.64			manual
20/01/2022	Employer Mandated	4,595.64			manual
14/04/2022	Employer Mandated	3,939.12			manual
24/06/2022	Employer Mandated	3,282.60			manual
29/06/2022	Employer Mandated	656.52			manual

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Totals:	17,069.52
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THE ALEX SUPERANNUATION FUND
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Ms Sarah Polkinghorne

Date of Birth: 19 Jun 1981
Age: 41 (at 30/06/2022)
Status: Member may be eligible for the bring forward rule, certain conditions apply

Contributions Summary

Prior Year Contributions		Non-Concessional	
Contributions for the previous 2 years are not confirmed			Unknown
3-year cap in effect from previous years			Unknown
Total non-concessional contributions in previous 2 years			Unknown
Current Year Contributions	Note	Concessional	Non-Concessional
Caps	1	27,500.00	110,000.00
Cumulative Available Unused Cap	2	69,743.49	0.00
Contributions made (to this fund)	3	2,770.99	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		2,770.99	0.00
Amount above caps	4	0.00	0.00
Available		94,472.50	110,000.00

Notes

- 1 . Non-concessional cap shown does NOT take prior year 'Bring Forward Rule' usage into account
- 2 . Member may be eligible to make catch-up concessional contributions
- 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	2,770.99
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	2,770.99
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
	COVID-19 Re-Contribution	0.00
	Total Other contributions	0.00

Transactions

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
26/07/2021	Employer Mandated	119.46			manual
26/08/2021	Employer Mandated	210.26			manual
27/09/2021	Employer Mandated	216.02			manual
26/10/2021	Employer Mandated	337.09			manual
26/11/2021	Employer Mandated	303.85			manual

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23/12/2021	Employer Mandated	244.27	manual
27/01/2022	Employer Mandated	227.89	manual
28/02/2022	Employer Mandated	109.20	manual
16/03/2022	Employer Mandated	111.57	manual
26/04/2022	Employer Mandated	372.69	manual
26/05/2022	Employer Mandated	258.75	manual
16/06/2022	Employer Mandated	259.94	manual
Totals:		2,770.99	
