

**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**

Contributions for the previous 2 years are not confirmed  
 3-year cap in effect from previous years  
 Total non-concessional contributions in previous 2 years

**Non-Concessional**

Unknown

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>
<b>Concessional</b>	<b>Employer</b>	<b>17,069.52</b>
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	<b>Contributions as allocated</b>	<b>17,069.52</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	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
	<b>Total Other contributions</b>	<b>0.00</b>

**Transactions**

<b>Date</b>	<b>Contribution Type</b>	<b>Concessional</b>	<b>Non-Concessional</b>	<b>Other</b>	<b>Source</b>
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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## Contribution Caps

For the Period From 1 July 2021 to 30 June 2022

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Mr Michael Polkinghorne

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Totals:	17,069.52
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**THE ALEX SUPERANNUATION FUND**  
**Contribution Caps**  
**For the Period From 1 July 2021 to 30 June 2022**

**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**

<b>Prior Year Contributions</b>		<b>Non-Concessional</b>	
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	
<b>Current Year Contributions</b>	<b>Note</b>	<b>Concessional</b>	<b>Non-Concessional</b>
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>
<b>Concessional</b>	<b>Employer</b>	<b>2,770.99</b>
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	<b>Contributions as allocated</b>	<b>2,770.99</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	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
<b>Total Other contributions</b>		<b>0.00</b>

**Transactions**

<b>Date</b>	<b>Contribution Type</b>	<b>Concessional</b>	<b>Non-Concessional</b>	<b>Other</b>	<b>Source</b>
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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## Contribution Caps

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### Ms Sarah Polkinghorne

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
<b>Totals:</b>		<b>2,770.99</b>	