

Levey Superannuation Fund
Contribution Caps
For the Period From 1 July 2021 to 30 June 2022

Mr Andrew Levey

Date of Birth: 26 Feb 1971
Age: 51 (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	0.00	0.00
Contributions made (to this fund)	3	18,875.00	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		18,875.00	0.00
Amount above caps	4	0.00	0.00
Available		8,625.00	110,000.00

Notes

- 1 . Non-concessional cap shown does NOT take prior year 'Bring Forward Rule' usage into account
- 2 . Total Superannuation Balance was \$500,000 or more at 30 June 2021, member not 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	18,875.00
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	18,875.00
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	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
01/07/2021	Employer Mandated	1,187.50			smsfdataflow
30/07/2021	Employer Mandated	1,187.50			smsfdataflow
27/08/2021	Employer Mandated	1,500.00			smsfdataflow
30/09/2021	Employer Mandated	1,500.00			smsfdataflow

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03/11/2021	Employer Mandated	1,500.00	smsfdataflow
29/11/2021	Employer Mandated	1,500.00	smsfdataflow
06/01/2022	Employer Mandated	1,500.00	smsfdataflow
28/01/2022	Employer Mandated	1,500.00	smsfdataflow
25/02/2022	Employer Mandated	1,500.00	smsfdataflow
07/04/2022	Employer Mandated	1,500.00	smsfdataflow
05/05/2022	Employer Mandated	1,500.00	smsfdataflow
31/05/2022	Employer Mandated	1,500.00	smsfdataflow
30/06/2022	Employer Mandated	1,500.00	smsfdataflow
Totals:		18,875.00	



Levey Superannuation Fund
Contribution Caps
For the Period From 1 July 2021 to 30 June 2022

Mrs Tina Levey

Date of Birth: 04 Jul 1969
Age: 52 (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	45,829.12	0.00
Contributions made (to this fund)	3	7,387.42	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		7,387.42	0.00
Amount above caps	4	0.00	0.00
Available		65,941.70	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	7,387.42
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	7,387.42
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
01/07/2021	Employer Mandated	395.83			smsfdataflow
09/07/2021	Employer Mandated	271.84			smsfdataflow
30/07/2021	Employer Mandated	395.83			smsfdataflow
07/08/2021	Employer Mandated	286.16			smsfdataflow
27/08/2021	Employer Mandated	250.00			smsfdataflow

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13/09/2021	Employer Mandated	469.24	smsfdataflow
30/09/2021	Employer Mandated	250.00	smsfdataflow
06/10/2021	Employer Mandated	286.16	smsfdataflow
03/11/2021	Employer Mandated	250.00	smsfdataflow
04/11/2021	Employer Mandated	286.16	smsfdataflow
29/11/2021	Employer Mandated	250.00	smsfdataflow
29/11/2021	Employer Mandated	286.16	smsfdataflow
20/12/2021	Employer Mandated	386.16	smsfdataflow
06/01/2022	Employer Mandated	250.00	smsfdataflow
28/01/2022	Employer Mandated	250.00	smsfdataflow
08/02/2022	Employer Mandated	429.24	smsfdataflow
25/02/2022	Employer Mandated	250.00	smsfdataflow
14/03/2022	Employer Mandated	286.16	smsfdataflow
07/04/2022	Employer Mandated	250.00	smsfdataflow
20/04/2022	Employer Mandated	286.16	smsfdataflow
05/05/2022	Employer Mandated	250.00	smsfdataflow
10/05/2022	Employer Mandated	286.16	smsfdataflow
31/05/2022	Employer Mandated	250.00	smsfdataflow
06/06/2022	Employer Mandated	286.16	smsfdataflow
30/06/2022	Employer Mandated	250.00	smsfdataflow
Totals:		7,387.42	