

THE P & T PEDERSEN SUPER FUND
Contribution Caps
For the Period From 1 July 2021 to 30 June 2022

Mr Jonathan Pedersen

Date of Birth: 21 Jul 1990
Age: 31 (at 30/06/2022)
Status: Member may be eligible for the bring forward rule, certain conditions apply

Contributions Summary**Non-Concessional****Prior Year Contributions**

The 'Bring Forward Rule' was NOT triggered in the previous 2 years
 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	27,500.00	110,000.00
Cumulative Available Unused Cap	3	75,000.00	0.00
Contributions made (to this fund)	4	65,000.00	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		65,000.00	0.00
Amount above caps	5	0.00	0.00
Available		37,500.00	110,000.00

Notes

- 1 . 'Bring Forward Rule' MAY be triggered this year
- 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	0.00
	Personal	65,000.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	65,000.00
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
28/06/2022	Personal	65,000.00			manual
	Totals:	65,000.00			

THE P & T PEDERSEN SUPER FUND
Contribution Caps
For the Period From 1 July 2021 to 30 June 2022

Mr Philip Pedersen

Date of Birth: 10 May 1963
Age: 59 (at 30/06/2022)
Status: Member may be eligible for the bring forward rule, certain conditions apply

Contributions Summary

Prior Year Contributions	Non-Concessional
The 'Bring Forward Rule' was NOT triggered in the previous 2 years	
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	27,500.00	110,000.00
Cumulative Available Unused Cap	3	50,000.00	0.00
Contributions made (to this fund)	4	27,500.00	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		27,500.00	0.00
Amount above caps	5	0.00	0.00
Available		50,000.00	110,000.00

Notes

- 1 . 'Bring Forward Rule' MAY be triggered this year
- 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	0.00
	Personal	27,500.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	27,500.00
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
28/06/2022	Personal	27,500.00			manual
	Totals:	27,500.00			

THE P & T PEDERSEN SUPER FUND
Contribution Caps
For the Period From 1 July 2021 to 30 June 2022

Mrs Tabitha Pedersen

Date of Birth: 14 Dec 1965
Age: 56 (at 30/06/2022)
Status: Member may be eligible for the bring forward rule, certain conditions apply

Contributions Summary

		Non-Concessional	
Prior Year Contributions			
The 'Bring Forward Rule' was NOT triggered in the previous 2 years			
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	27,500.00	110,000.00
Cumulative Available Unused Cap	3	50,000.00	0.00
Contributions made (to this fund)	4	27,500.00	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		27,500.00	0.00
Amount above caps	5	0.00	0.00
Available		50,000.00	110,000.00

Notes

- 1 . 'Bring Forward Rule' MAY be triggered this year
- 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	0.00
	Personal	27,500.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	27,500.00
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
28/06/2022	Personal	27,500.00			manual
Totals:		27,500.00			

Elizabeth Meiklejohn

From: tabped@bigpond.com
Sent: Tuesday, 28 June 2022 8:47 AM
To: Elizabeth Meiklejohn
Subject: Super contributions

Hello Elizabeth

Just a quick note, to explain.

I have transferred super contributions for Philip and myself, today. Of \$27,500.00 each.

Kind Regards,

Tabitha Pedersen

P & T Pedersen Investments Pty Ltd

ABN 40 983 500 213

Elizabeth Meiklejohn

From: Alex Robertson <AlexR@mtaccountants.com.au >
Sent: Tuesday, 7 June 2022 3:51 PM
To: Elizabeth Meiklejohn
Cc: Stephanie Natividad
Subject: PED01

Hi Liz

Nigel would like to contribute \$65k concessional into his SMSF for FY22. Nigel would also like to make a non-concessional contribution.

Jon would also like to contribute \$65k concessional into his SMSF for FY22. Can Luella also be added to Jon's SMSF for FY22? Luella would also like to contribute \$65k concessional for FY22.

Please let me know, if you have any queries.

Cheers

Alex

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