

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

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	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

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	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
 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	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

PS – We are always open for new business so please pass on our details to any friends, family or colleagues whom would benefit from our services.



Alex Robertson | Director

☎ 07 3422 8000

✉ PO Box 83, Mount Gravatt Q 4122

📍 Lvl 1, 1454 Logan Rd Mt Gravatt Central Q 4122

🌐 www.marsh tincknell.com.au

[Pay your bill online](#)

[Connect with us](#)

Marsh Tincknell Pty Ltd ACN 137 316 815

Liability limited by a scheme approved under Professional Standards legislation

Disclaimer: If the information in this email relates to your business, personal or financial affairs, it is either factual or was in relation to taxation advice, therefore does not constitute financial product advice and should not be relied upon as financial product advice. Taxation is only one of the matters that you need to consider when making a decision and none of the information provided takes into account your personal objectives, financial situation or needs. You must determine whether the information is appropriate in terms of your particular circumstances. For financial product advice that takes account of your particular objectives, financial situation or needs, you should consider seeking financial advice from an Australian Financial Services licensee before making a financial decision.

Please note that collection, use and storage of all information held by the MT Group is governed by our Privacy Policy. This email and any attachment are confidential. If you are not the intended recipient, please notify Marsh Tincknell by reply email and delete this email. Please note that you must not access or use this email or any information in it. Marsh Tincknell accepts no liability for viruses in this email or in any attachment to it.

Protected by [Netbox Blue](#)