

**ALBRECHT FAMILY SUPERANNUATION FUND**  
**Contribution Caps**  
**For the Period From 1 July 2020 to 30 June 2021**

*Brenda Wishey*

**Mr Barry Albrecht**

**Date of Birth:** 23 Jul 1951  
**Age:** 69 (at 30/06/2021)  
**Status:** Member must meet work test criteria, other conditions apply

**Contributions Summary**

**Non-Concessional**

**Prior Year Contributions**

The 'Bring Forward Rule' was unavailable in previous 2 years; member was 65 or older  
 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	25,000.00	100,000.00
Cumulative Available Unused Cap	3	0.00	0.00
Contributions made (to this fund)	4	25,000.00	69,060.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		25,000.00	69,060.00
Amount above caps	5	0.00	0.00
Available		0.00	30,940.00

**Notes**

- 1 . 'Bring Forward Rule' can NOT be triggered this year; member was 67 or older
- 2 . Non-concessional cap shown applies to current year only
- 3 . Total Superannuation Balance was \$500,000 or more at 30 June 2020, member not 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>
<b>Concessional</b>	<b>Employer</b>	<b>3,705.00</b>
	<b>Personal</b>	<b>21,295.00</b>
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	<b>Contributions as allocated</b>	<b>25,000.00</b>
<b>NonConcessional</b>	<b>Personal</b>	<b>69,060.00</b>
	Spouse	0.00
	Child	0.00
	Transfers from reserve	0.00
	Foreign superannuation fund	0.00
	<b>Contributions as allocated</b>	<b>69,060.00</b>
<b>Other</b>	CGT small business 15-year exception	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
	<b>Total Other contributions</b>	<b>0.00</b>

**Transactions**

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
20/07/2020	Personal		5,755.00		manual
15/08/2020	Personal		5,755.00		manual
15/09/2020	Personal		5,755.00		manual
15/10/2020	Personal		5,755.00		manual
27/10/2020	Employer Mandated	997.50			manual
15/11/2020	Personal		5,755.00		manual

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**Mr Barry Albrecht**

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15/12/2020	Personal		5,755.00		manual
06/01/2021	Employer Mandated	997.50			manual
15/01/2021	Personal		5,755.00		manual
15/02/2021	Personal		5,755.00		manual
15/03/2021	Personal		5,755.00		manual
14/04/2021	Employer Mandated	855.00			manual
15/04/2021	Personal		5,755.00		manual
15/05/2021	Personal		5,755.00		manual
15/06/2021	Personal		5,755.00		manual
18/06/2021	Personal	12,500.00			manual
21/06/2021	Personal	8,795.00			manual
22/06/2021	Employer Mandated	855.00			manual
<b>Totals:</b>		<b>25,000.00</b>	<b>69,060.00</b>		

**SMSF DataFlow Transactions**

Payment Date	Contribution Type	Amount	Payment Reference	Status
<b>SUENA MANGOES PTY. LIMITED</b>				
27/10/2020	Employer Mandated	997.50	ATO008000013898581	Cancelled
06/01/2021	Employer Mandated	997.50	ATO004000013984982	Cancelled
14/04/2021	Employer Mandated	855.00	ATO002000014719645	Cancelled
22/06/2021	Employer Mandated	855.00	ATO002000014904408	Cancelled
<b>Subtotal:</b>		<b>3,705.00</b>		

Disclaimer: SMSF Dataflow contributions received via SuperStream will only display where smsfdataflow was the elected electronic services address (ESA), and the member and fund details provided to their employer or Super Clearing House matched the records on Class.

**ALBRECHT FAMILY SUPERANNUATION FUND**  
**Contribution Caps**  
**For the Period From 1 July 2020 to 30 June 2021**

**Mrs Susan Albrecht**

**Date of Birth:** 6 Oct 1951  
**Age:** 69 (at 30/06/2021)  
**Status:** Member must meet work test criteria, other conditions apply

**Contributions Summary**

**Non-Concessional**

**Prior Year Contributions**

The 'Bring Forward Rule' was unavailable in previous 2 years; member was 65 or older  
 3-year cap in effect from previous years  
 Total non-concessional contributions in previous 2 years

N/A  
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	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	<b>Contributions as allocated</b>	<b>25,000.00</b>
<b>NonConcessional</b>	<b>Personal</b>	<b>69,060.00</b>
	Spouse	0.00
	Child	0.00
	Transfers from reserve	0.00
	Foreign superannuation fund	0.00
	<b>Contributions as allocated</b>	<b>69,060.00</b>
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	<b>Total Other contributions</b>	<b>0.00</b>

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27/10/2020	Employer Mandated	997.50			manual
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**Mrs Susan Albrecht**

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
15/12/2020	Personal		5,755.00		manual
06/01/2021	Employer Mandated	997.50			smsfdataflow
15/01/2021	Personal		5,755.00		manual
15/02/2021	Personal		5,755.00		manual
15/03/2021	Personal		5,755.00		manual
14/04/2021	Employer Mandated	855.00			smsfdataflow
15/04/2021	Personal		5,755.00		manual
15/05/2021	Personal		5,755.00		manual
15/06/2021	Personal		5,755.00		manual
18/06/2021	Personal	12,500.00			manual
21/06/2021	Personal	8,795.00			manual
22/06/2021	Employer Mandated	855.00			smsfdataflow
<b>Totals:</b>		<b>25,000.00</b>	<b>69,060.00</b>		

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Payment Date	Contribution Type	Amount	Payment Reference	Status
<b>SUENA MANGOES PTY. LIMITED</b>				
27/10/2020	Employer Mandated	997.50	ATO008000013898580	Cancelled
06/01/2021	Employer Mandated	997.50	ATO004000013984981	Automated Feed
14/04/2021	Employer Mandated	855.00	ATO002000014719644	Automated Feed
22/06/2021	Employer Mandated	855.00	ATO002000014904407	Automated Feed
<b>Subtotal:</b>		<b>3,705.00</b>		

Disclaimer: SMSF Dataflow contributions received via SuperStream will only display where smsfdataflow was the elected electronic services address (ESA), and the member and fund details provided to their employer or Super Clearing House matched the records on Class.

## Brenda Wishey

**From:** Randal King <RandalK@mtaccountants.com.au>  
**Sent:** Monday, 10 January 2022 4:43 PM  
**To:** Brenda Wishey  
**Cc:** Rachel Green-Luther; Taylor Chinn  
**Subject:** RE: ALBRECHT FAMILY SUPERANNUATION FUND - 2021 Contribution Confirmation

Hi Brenda

Only the SG Contributions are to be employer contributions – i.e. \$3,705 each. The remaining \$21,295 each are to be personal concessional contributions. The non-concessional amounts shown below are OK.

Thanks,  
Randal

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.



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financial success, and freedom of choice*



**Randal King | Senior Associate**

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**From:** Brenda Wishey <BrendaW@virtusuper.com.au>  
**Sent:** Monday, 10 January 2022 3:48 PM  
**To:** Randal King <RandalK@mtaccountants.com.au>  
**Cc:** Virtu - RachelG - External <rachelg@virtusuper.com.au>  
**Subject:** ALBRECHT FAMILY SUPERANNUATION FUND - 2021 Contribution Confirmation

Morning Randall

We are commencing work on the above fund. Can you confirm the below contributions?

	Employer	Non-Concessional
Barry	\$25,000	\$69,060
Susan	\$25,000	\$69,060

Attached is the Contributions Ledger to show what has been processed.

Kind regards  
Brenda