

Qld Communications Pty Ltd Superannuation Pension Fund

Contribution Caps

For the Period From 1 July 2020 to 30 June 2021

Mr Bruce Baumann

Date of Birth: 29 Nov 1968

Age: 52 (at 30/06/2021)

Status: Member may be eligible for the bring forward rule, certain conditions apply

Contributions Summary

Non-Concessional

Prior Year Contributions

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

Current Year Contributions

Note

Concessional

Non-Concessional

Caps	1	25,000.00	100,000.00
Cumulative Available Unused Cap	2	50,000.00	0.00
Contributions made (to this fund)	3	0.00	300,000.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		0.00	300,000.00
Amount above caps	4	0.00	200,000.00
Available		75,000.00	0.00

NOTE: Bruce called 29/6/21 to advise he would be making a \$300,000 bring forward contribution to the SMSF.

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 [Bruce utilised the 3yr bring-forward non-concessional contribution rule 27/6/2017](#)
- 4 . Any excess concessional contributions are treated as non-concessional [Bruce's total super balance as at 30th June 2020 was less than \\$1.6m](#)

Contributions Breakdown

This makes him eligible to utilise the 3yr bring-forward rule in 2020-2021

<u>Income Type</u>	<u>Contribution Type</u>	<u>Amount</u>
Concessional	Employer	0.00
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	0.00
NonConcessional	Personal	300,000.00
	Spouse	0.00
	Child	0.00
	Transfers from reserve	0.00
	Foreign superannuation fund	0.00
	Contributions as allocated	300,000.00
Other	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
	Total Other contributions	0.00

Transactions

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
30/06/2021	Personal		300,000.00		manual
Totals:			300,000.00		

See Y workpaper
Brenda called Bruce 23/11/2021
Bruce advised that he didn't have
any other super monies other than
the SMSF and Sunsuper

Qld Communications Pty Ltd Superannuation Pension Fund**Contribution Caps****For the Period From 1 July 2020 to 30 June 2021**

Mrs Norma Baumann**Date of Birth:** 9 Jun 1935**Age:** 86 (at 30/06/2021)**Status:** Generally no contributions allowed, some exceptions 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

N/A

Total non-concessional contributions in previous 2 years

N/A

Current Year Contributions	Note	Concessional	Non-Concessional
Caps	1	25,000.00	0.00
Cumulative Available Unused Cap	2	0.00	0.00
Contributions made (to this fund)	3	0.00	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		0.00	0.00
Amount above caps	4	0.00	0.00
Available		25,000.00	0.00

Notes

- 1 . Total Superannuation Balance was \$1.6 million or more at 30 June 2020, member not eligible to make Non-Concessional Contributions
- 2 . Total Superannuation Balance was \$500,000 or more at 30 June 2020, member not eligible to make catch-up concessional contributions
- 3 . Excludes any unmatched deposits
- 4 . Any excess concessional contributions are treated as non-concessional

Qld Communications Pty Ltd Superannuation Pension Fund**Contribution Caps****For the Period From 1 July 2020 to 30 June 2021**

Ms Michelle Baumann**Date of Birth:** 16 Nov 1973**Age:** 47 (at 30/06/2021)**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 triggered in the previous year

3-year cap in effect from previous year

300,000.00

Total non-concessional contributions in previous year

300,000.00

Current Year Contributions**Note****Concessional****Non-Concessional**

Caps

1,2

25,000.00

0.00

Cumulative Available Unused Cap

3

0.00

0.00

Contributions made (to this fund)

4

0.00

0.00

Contributions made (to other funds)

0.00

0.00

Contributions as allocated

0.00

0.00

Amount above caps

5

0.00

0.00

Available

25,000.00

0.00

Notes

1 . 'Bring Forward Rule' was triggered in previous year

2 . Non-concessional cap shown is the total for the current year and next year

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