

Orford Superannuation Fund
Contribution Caps
For the Period From 1 July 2020 to 30 June 2021

Elizabeth Meiklejohn

Mr Ernest May

Date of Birth: 22 Aug 1949
Age: 71 (at 30/06/2021)
Status: Only employer or personal contributions allowed subject to the work test

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	1,2	25,000.00	100,000.00
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	100,000.00

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

Orford Superannuation Fund
Contribution Caps
For the Period From 1 July 2020 to 30 June 2021

Mr Gordon May

NOTE: Gordon works full time and meets the work test

Date of Birth: 28 Mar 1953
Age: 68 (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 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	25,000.00	100,000.00
Cumulative Available Unused Cap	3	543.12	0.00
Contributions made (to this fund)	4	24,882.59	0.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		24,882.59	0.00
Amount above caps	5	0.00	0.00
Available		660.53	100,000.00

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 . 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	24,882.59
	Personal	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	24,882.59
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 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
03/07/2020	Employer Mandated	1,170.77			manual
04/08/2020	Employer Mandated	1,670.77			manual
03/09/2020	Employer Mandated	1,704.59			manual
02/10/2020	Employer Mandated	1,670.77			manual
11/11/2020	Employer Mandated	1,670.77			manual
03/12/2020	Employer Mandated	2,096.33			manual
11/01/2021	Employer Mandated	1,681.78			manual

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Mr Gordon May

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
03/02/2021	Employer Mandated	2,668.11			manual
03/03/2021	Employer Mandated	2,668.11			manual
06/04/2021	Employer Mandated	2,618.11			manual
05/05/2021	Employer Mandated	2,621.74			manual
03/06/2021	Employer Mandated	2,640.74			manual
Totals:		24,882.59			

Orford Superannuation Fund
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For the Period From 1 July 2020 to 30 June 2021

Mrs Estelle May

Date of Birth: 21 Nov 1950
Age: 70 (at 30/06/2021)
Status: Only employer or personal contributions allowed subject to the work test

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	50,000.00	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		75,000.00	100,000.00

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 . 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

Orford Superannuation Fund
Contribution Caps
For the Period From 1 July 2020 to 30 June 2021

Mrs Lynette May

Date of Birth: 1 Feb 1953
Age: 68 (at 30/06/2021)
Status: Member must meet work test criteria, other 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	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	100,000.00

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 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