

**Bucknall Superannuation Fund
Contribution Caps**

Brenda Wishey

For the Period From 1 July 2020 to 30 June 2021

Mr Mark Bucknall

Liz called Mark 6 Nov 2020. He makes max concessional contributions to Qsuper every year.
All contributions for SMSF are NCC

Date of Birth: 9 Aug 1956

Age: 64 (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 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	25,000.00	100,000.00
Cumulative Available Unused Cap	3	50,000.00	0.00
Contributions made (to this fund)	4	0.00	24,968.75
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		0.00	24,968.75
Amount above caps	5	0.00	0.00
Available		75,000.00	75,031.25

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	0.00
	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	0.00
NonConcessional	Personal	24,968.75
	Spouse	0.00
	Child	0.00
	Transfers from reserve	0.00
	Foreign superannuation fund	0.00
	Contributions as allocated	24,968.75
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
	Total Other contributions	0.00

Transactions

Date	Contribution Type	Concessional	Non-Concessional	Other	Source
01/07/2020	Personal		1,000.00		manual
15/07/2020	Personal		1,000.00		manual
29/07/2020	Personal		1,000.00		manual
12/08/2020	Personal		1,000.00		manual
26/08/2020	Personal		1,000.00		manual
23/09/2020	Personal		1,000.00		manual
07/10/2020	Personal		1,000.00		manual

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Date	Contribution Type	Concessional	Non-Concessional	Other	Source
21/10/2020	Personal		1,000.00		manual
04/11/2020	Personal		1,000.00		manual
18/11/2020	Personal		1,000.00		manual
16/12/2020	Personal		1,000.00		manual
30/12/2020	Personal		1,000.00		manual
04/01/2021	Personal		120.00		manual
13/01/2021	Personal		1,000.00		manual
10/02/2021	Personal		1,000.00		manual
24/02/2021	Personal		1,000.00		manual
10/03/2021	Personal		1,000.00		manual
24/03/2021	Personal		1,000.00		manual
07/04/2021	Personal		1,000.00		manual
21/04/2021	Personal		600.00		manual
05/05/2021	Personal		600.00		manual
19/05/2021	Personal		600.00		manual
02/06/2021	Personal		600.00		manual
16/06/2021	Personal		600.00		manual
30/06/2021	Personal		600.00		manual
30/06/2021	Personal		3,248.75 *		manual
Totals:			24,968.75		

* Reimbursed the member for property expenses paid by him personally