

T & G MULLER SUPERANNUATION FUND
Contribution Caps
For the Period From 1 July 2021 to 30 June 2022

Elizabeth Meiklejohn

Mr Trevor Muller

Date of Birth: 29 May 1951
Age: 71 (at 30/06/2022)
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	27,500.00	110,000.00
Cumulative Available Unused Cap	3	0.00	0.00
Contributions made (to this fund)	4	27,500.00	100,000.00
Contributions made (to other funds)		0.00	0.00
Contributions as allocated		27,500.00	100,000.00
Amount above caps	5	0.00	0.00
Available		0.00	10,000.00

Notes

- 'Bring Forward Rule' can NOT be triggered this year; member was 67 or older
- Non-concessional cap shown applies to current year only
- Total Superannuation Balance was \$500,000 or more at 30 June 2021, member not eligible to make catch-up concessional contributions
[Glenys meets the work test. She works in the office up to 4 days a week.](#)
- Excludes any unmatched deposits [Liz spoke to Glenys and Trevor. They made non concessional contributions of \\$100,000 each.](#)
- 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	100,000.00
	Spouse	0.00
	Child	0.00
	Transfers from reserve	0.00
	Foreign superannuation fund	0.00
	Contributions as allocated	100,000.00
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
23/06/2022	Personal	27,500.00			manual
27/06/2022	Personal		100,000.00		manual
Totals:		27,500.00	100,000.00		

T & G MULLER SUPERANNUATION FUND
Contribution Caps
For the Period From 1 July 2021 to 30 June 2022

Mrs Glenys Muller

Date of Birth: 29 Dec 1953
Age: 68 (at 30/06/2022)
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	27,500.00	110,000.00
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Contributions made (to other funds)		0.00	0.00
Contributions as allocated		27,500.00	100,000.00
Amount above caps	5	0.00	0.00
Available		0.00	10,000.00

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 2021, 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

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	Family and friends	0.00
	Foreign superannuation fund	0.00
	Transfers from reserve	0.00
	Contributions as allocated	27,500.00
NonConcessional	Personal	100,000.00
	Spouse	0.00
	Child	0.00
	Transfers from reserve	0.00
	Foreign superannuation fund	0.00
	Contributions as allocated	100,000.00
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
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