



Total superannuation balance

Your client's total superannuation balance is used to determine their eligibility to make contributions, receive co-contributions, and their spouse's eligibility to claim a tax offset for spouse contributions they make. For your clients who are members of a self-managed super fund, or small APRA fund, the trustee of the fund will also use their members' total superannuation balance to determine whether the segregated assets method can be used to calculate exempt current pension income.

Date generated 28/09/2020
Total superannuation balance as at 30/06/2018 \$702,074.42

Financial year 2017 - 2018

Accumulation phase	\$18,119.51 CR
Fund	THE TRUSTEE FOR JULIE MARR SUPERANNUATION FUND
Account number	1
Amount	\$17,645.20 CR
Fund	THE TRUSTEE FOR WEALTH PERSONAL SUPERANNUATION AND PENSION FUND
USI	NMM0006AU
Account number	0096060I201
Amount	\$474.31 CR
Retirement phase	\$683,954.91 CR
Fund	THE TRUSTEE FOR JULIE MARR SUPERANNUATION FUND
Account number	1
Amount	\$683,954.91 CR
Total superannuation balance as at 30 June 2018	\$702,074.42 CR

Financial year 2016 - 2017

Accumulation phase	\$670,668.73 CR
Fund	THE TRUSTEE FOR JULIE MARR SUPERANNUATION FUND
Account number	1
Amount	\$670,668.73 CR
Fund	THE TRUSTEE FOR WEALTH PERSONAL SUPERANNUATION AND PENSION FUND
USI	NMM0006AU
Account number	0096060I201
Amount	\$0.00
Total superannuation balance as at 30 June 2017	\$670,668.73 CR

