



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 04/02/2022
Total superannuation balance as at 30/06/2021 \$460,947.35

Financial year 2020 - 2021

Accumulation phase	\$460,947.35 CR
Fund	WEALTH PERSONAL SUPERANNUATION AND PENSION FUND
USI	NMM0008AU
Account number	0141049L201
Amount	\$460,947.35 CR
Total superannuation balance as at 30 June 2021	\$460,947.35 CR

Financial year 2019 - 2020

Accumulation phase	\$432,489.50 CR
Fund	LINDSAY FORD SUPERANNUATION FUND
USI	00000000000000
Account number	SMSF115199856665
Amount	\$46,360.70 CR

Lump Sum withdrawal 2021 yr

Total superannuation balance as at 30 June 2020 \$1,717,722.05 CR

Fund	WEALTH PERSONAL SUPERANNUATION AND PENSION FUND
USI	NMM0008AU
Account number	0141049L201
Amount	\$386,128.80 CR
Retirement phase	\$1,285,232.55 CR
Fund	LINDSAY FORD SUPERANNUATION FUND
USI	00000000000000
Account number	SMSF115199856665
Amount	\$1,285,232.55 CR
Total superannuation balance as at 30 June 2020	\$1,717,722.05 CR

Financial year 2018 - 2019

Accumulation phase	\$467,477.31 CR
Fund	LINDSAY FORD SUPERANNUATION FUND
USI	00000000000000
Account number	SMSF115199856665
Amount	\$51,946.76 CR
Fund	WEALTH PERSONAL SUPERANNUATION AND PENSION FUND
USI	NMM0008AU
Account number	0141049L201
Amount	\$415,530.55 CR
Retirement phase	\$1,265,147.32 CR
Fund	LINDSAY FORD SUPERANNUATION FUND
USI	00000000000000
Account number	SMSF115199856665
Amount	\$1,265,147.32 CR
Total superannuation balance as at 30 June 2019	\$1,732,624.63 CR

Financial year 2017 - 2018

Accumulation phase	\$440,533.53 CR
Fund	THE TRUSTEE FOR LINDSAY FORD SUPERANNUATION FUND
Account number	1
Amount	\$46,760.43 CR
Fund	THE TRUSTEE FOR WEALTH PERSONAL SUPERANNUATION AND PENSION FUND
USI	NMM0008AU
Account number	0141049L201
Amount	\$393,773.10 CR
Retirement phase	\$1,260,449.75 CR
Fund	THE TRUSTEE FOR LINDSAY FORD SUPERANNUATION FUND
Account number	1
Amount	\$1,260,449.75 CR
Total superannuation balance as at 30 June 2018	\$1,700,983.28 CR

Financial year 2016 - 2017

Accumulation phase	\$358,990.94 CR
Fund	Calculated APV
Amount	\$1,262,065.28 DR
Fund	THE TRUSTEE FOR LINDSAY FORD SUPERANNUATION FUND
Account number	1
Amount	\$1,262,065.28 CR
Fund	THE TRUSTEE FOR WEALTH PERSONAL SUPERANNUATION AND PENSION FUND
USI	NMM0008AU
Account number	0141049L201
Amount	\$358,990.94 CR
Total superannuation balance as at 30 June 2017	\$1,621,056.22 CR

Retirement phase	\$1,262,065.28 CR
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Fund	LINDSAY FORD SUPERANNUATION FUND
Account number	515
Amount	\$250,416.39 CR
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Fund	LINDSAY FORD SUPERANNUATION FUND
Account number	509
Amount	\$1,011,648.89 CR
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Total superannuation balance as at 30 June 2017	\$1,621,056.22 CR