



**Australian Government**

**Australian Taxation Office**

**Agent** DGZ  
**Client** FORD, ALISON  
**TFN** 478 202 313

## Total superannuation balance

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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.

<b>Date generated</b>	04/02/2022
<b>Total superannuation balance as at 30/06/2021</b>	\$466,998.66

### Financial year 2020 - 2021

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<b>Accumulation phase</b>	<b>\$466,998.66 CR</b>
Fund	WEALTH PERSONAL SUPERANNUATION AND PENSION FUND
USI	NMM0008AU
Account number	0141048L201
Amount	\$466,998.66 CR
<b>Total superannuation balance as at 30 June 2021</b>	<b>\$466,998.66 CR</b>

### Financial year 2019 - 2020

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<b>Accumulation phase</b>	<b>\$391,170.85 CR</b>
Fund	LINDSAY FORD SUPERANNUATION FUND
USI	00000000000000
Account number	SMSF115199856678
Amount	\$0.00

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<b>Total superannuation balance as at 30 June 2020</b>	<b>\$1,624,288.21 CR</b>
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Fund	WEALTH PERSONAL SUPERANNUATION AND PENSION FUND
USI	NMM0008AU
Account number	0141048L201
Amount	\$391,170.85 CR
<b>Retirement phase</b>	<b>\$1,233,117.36 CR</b>
Fund	LINDSAY FORD SUPERANNUATION FUND
USI	00000000000000
Account number	SMSF115199856678
Amount	\$1,233,117.36 CR
<b>Total superannuation balance as at 30 June 2020</b>	<b>\$1,624,288.21 CR</b>

### Financial year 2018 - 2019

<b>Accumulation phase</b>	<b>\$421,005.74 CR</b>
Fund	LINDSAY FORD SUPERANNUATION FUND
USI	00000000000000
Account number	SMSF115199856678
Amount	\$0.00
Fund	WEALTH PERSONAL SUPERANNUATION AND PENSION FUND
USI	NMM0008AU
Account number	0141048L201
Amount	\$421,005.74 CR
<b>Retirement phase</b>	<b>\$1,194,632.54 CR</b>
Fund	LINDSAY FORD SUPERANNUATION FUND
USI	00000000000000
Account number	SMSF115199856678
Amount	\$1,194,632.54 CR
<b>Total superannuation balance as at 30 June 2019</b>	<b>\$1,615,638.28 CR</b>

### Financial year 2017 - 2018

<b>Accumulation phase</b>	<b>\$398,936.80 CR</b>
Fund	THE TRUSTEE FOR WEALTH PERSONAL SUPERANNUATION AND PENSION FUND
USI	NMM0008AU
Account number	0141048L201
Amount	\$398,936.80 CR
<b>Retirement phase</b>	<b>\$1,235,028.93 CR</b>
Fund	THE TRUSTEE FOR LINDSAY FORD SUPERANNUATION FUND
Account number	2
Amount	\$1,235,028.93 CR
<b>Total superannuation balance as at 30 June 2018</b>	<b>\$1,633,965.73 CR</b>

### Financial year 2016 - 2017

<b>Accumulation phase</b>	<b>\$363,712.01 CR</b>
Fund	Calculated APV
Amount	\$1,187,943.34 DR
Fund	THE TRUSTEE FOR LINDSAY FORD SUPERANNUATION FUND
Account number	2
Amount	\$1,187,943.34 CR
Fund	THE TRUSTEE FOR WEALTH PERSONAL SUPERANNUATION AND PENSION FUND
USI	NMM0008AU
Account number	0141048L201
Amount	\$363,712.01 CR
<b>Retirement phase</b>	<b>\$1,187,943.34 CR</b>
Fund	LINDSAY FORD SUPERANNUATION FUND
Account number	516
Amount	\$250,416.40 CR
<b>Total superannuation balance as at 30 June 2017</b>	<b>\$1,551,655.35 CR</b>

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Fund	LINDSAY FORD SUPERANNUATION FUND
Account number	510
Amount	\$937,526.94 CR

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<b>Total superannuation balance as at 30 June 2017</b>	<b>\$1,551,655.35 CR</b>
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