



**Agent** DGZ  
**Client** KELLY, ANTHONY  
**TFN** 487 929 264

## 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.

**Date generated** 01/11/2022  
**Total superannuation balance as at 30/06/2021** \$861,057.20

### Financial year 2020 - 2021

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<b>Accumulation phase</b>	<b>\$861,057.20 CR</b>
Fund	ANTHONY KELLY OPT PTY LTD SUPERANNUATI ON FUND
USI	00000000000000
Account number	SMSF113797102326
Amount	\$834,336.00 CR
Fund	NATIONAL MUTUAL RETIREMENT FUND
USI	76746741299020
Account number	Q8613006-J
Amount	\$26,721.20 CR
<b>Retirement phase</b>	<b>\$0.00</b>
Fund	ANTHONY KELLY OPT PTY LTD SUPERANNUATI ON FUND
USI	00000000000000
Account number	SMSF113797102326
Amount	\$0.00
<b>Total superannuation balance as at 30 June 2021</b>	<b>\$861,057.20 CR</b>

### Financial year 2019 - 2020

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**Accumulation phase****\$659,904.50 CR**

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Fund	ANTHONY KELLY OPT PTY LTD SUPERANNUATI ON FUND
USI	00000000000000
Account number	SMSF113797102326
Amount	\$634,966.00 CR

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Fund	NATIONAL MUTUAL RETIREMENT FUND
USI	76746741299020
Account number	Q8613006-J
Amount	\$24,938.50 CR

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**Retirement phase****\$0.00**

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Fund	ANTHONY KELLY OPT PTY LTD SUPERANNUATI ON FUND
USI	00000000000000
Account number	SMSF113797102326
Amount	\$0.00

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**Total superannuation balance as at 30 June  
2020****\$659,904.50 CR****Financial year 2018 - 2019****Accumulation phase****\$682,065.50 CR**

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Fund	ANTHONY KELLY OPT PTY LTD SUPERANNUATI ON FUND
USI	00000000000000
Account number	SMSF113797102326
Amount	\$658,438.00 CR

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Fund	AMP SUPERANNUATION SAVINGS TRUST
USI	76514770399004
Account number	Q8613006-J
Amount	\$23,627.50 CR

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**Retirement phase****\$0.00****Total superannuation balance as at 30 June  
2019****\$682,065.50 CR**

Fund	ANTHONY KELLY OPT PTY LTD SUPERANNUATI ON FUND
USI	00000000000000
Account number	SMSF113797102326
Amount	\$0.00

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**Total superannuation balance as at 30 June 2019**      **\$682,065.50 CR**

### Financial year 2017 - 2018

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**Accumulation phase**      **\$628,219.40 CR**

Fund	ANTHONY KELLY OPTOMETRISTS PTY LTD SUPERANNUATION FUND
Account number	1
Amount	\$605,865.00 CR

Fund	THE TRUSTEE FOR AMP SUPERANNUATION SAVINGS TRUST
USI	76514770399004
Account number	Q8613006-J
Amount	\$22,354.40 CR

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**Total superannuation balance as at 30 June 2018**      **\$628,219.40 CR**

### Financial year 2016 - 2017

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**Accumulation phase**      **\$592,547.20 CR**

Fund	ANTHONY KELLY OPTOMETRISTS PTY LTD SUPERANNUATION FUND
Account number	1
Amount	\$571,475.00 CR

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**Total superannuation balance as at 30 June 2017**      **\$592,547.20 CR**

Fund	THE TRUSTEE FOR AMP SUPERANNUATION SAVINGS TRUST
USI	76514770399004
Account number	Q8613006-J
Amount	\$21,072.20 CR
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<b>Total superannuation balance as at 30 June 2017</b>	<b>\$592,547.20 CR</b>