



Agent DGZ
Client KELLY, CHRISTINA
ABN 46 765 825 645

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 01/11/2022
Total superannuation balance as at 30/06/2021 \$273,741.00

Financial year 2020 - 2021

Accumulation phase	\$0.00
Fund	ANTHONY KELLY OPT PTY LTD SUPERANNUATI ON FUND
USI	00000000000000
Account number	SMSF113797102339
Amount	\$0.00
Retirement phase	\$273,741.00 CR
Fund	ANTHONY KELLY OPT PTY LTD SUPERANNUATI ON FUND
USI	00000000000000
Account number	SMSF113797102339
Amount	\$273,741.00 CR
Total superannuation balance as at 30 June 2021	\$273,741.00 CR

Financial year 2019 - 2020

Accumulation phase	\$0.00
Total superannuation balance as at 30 June 2020	\$330,423.00 CR

Fund	ANTHONY KELLY OPT PTY LTD SUPERANNUATI ON FUND
USI	00000000000000
Account number	SMSF113797102339
Amount	\$0.00

Retirement phase	\$330,423.00 CR
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Fund	ANTHONY KELLY OPT PTY LTD SUPERANNUATI ON FUND
USI	00000000000000
Account number	SMSF113797102339
Amount	\$330,423.00 CR

Total superannuation balance as at 30 June 2020	\$330,423.00 CR
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Financial year 2018 - 2019

Accumulation phase	\$468,945.66 CR
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Fund	ANTHONY KELLY OPT PTY LTD SUPERANNUATI ON FUND
USI	00000000000000
Account number	SMSF113797102339
Amount	\$466,584.00 CR

Fund	SUNSUPER SUPERANNUATION FUND
USI	98503137921001
Account number	901352101_SOL
Amount	\$2,361.66 CR

Retirement phase	\$0.00
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Fund	ANTHONY KELLY OPT PTY LTD SUPERANNUATI ON FUND
USI	00000000000000
Account number	SMSF113797102339
Amount	\$0.00

Total superannuation balance as at 30 June 2019	\$468,945.66 CR
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Financial year 2017 - 2018

Accumulation phase	\$435,643.62 CR
Fund	ANTHONY KELLY OPTOMETRISTS PTY LTD SUPERANNUATION FUND
Account number	2
Amount	\$433,284.00 CR
Fund	THE TRUSTEE FOR SUNSUPER SUPERANNUATION FUND
USI	98503137921001
Account number	901352101
Amount	\$2,359.62 CR
Total superannuation balance as at 30 June 2018	\$435,643.62 CR

Financial year 2016 - 2017

Accumulation phase	\$412,209.47 CR
Fund	ANTHONY KELLY OPTOMETRISTS PTY LTD SUPERANNUATION FUND
Account number	2
Amount	\$410,178.00 CR
Fund	THE TRUSTEE FOR MERCY SUPER
USI	11789425178001
Account number	303541
Amount	\$0.00
Fund	THE TRUSTEE FOR MERCY SUPER
USI	11789425178001
Account number	MY1501-303541
Amount	\$0.00
Fund	THE TRUSTEE FOR SUNSUPER SUPERANNUATION FUND
USI	98503137921001
Account number	901352101
Amount	\$2,031.47 CR
Total superannuation balance as at 30 June 2017	\$412,209.47 CR

