



Total superannuation balance

Important

- > All data is based on information reported to us by your client, or their super funds, and processed through our systems.
- > Decisions made with this information can have tax consequences for your client. Your clients can refer to their own records or contact their funds to obtain up-to-date information.

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.

Total superannuation balance as at 30/06/2020

\$659,904.50

Current



History

Total superannuation balance details for previous financial years.



Financial year 2019 - 2020

Type

Amount


Type				Amount
Accumulation phase				\$659,904.50 CR 
Fund	USI	Account number	Amount	
ANTHONY KELLY OPT PTY LTD SUPERANNUATI ON FUND	00000000000000	SMSF113797102326	\$634,966.00 CR	
NATIONAL MUTUAL RETIREMENT FUND	76746741299020	Q8613006-J	\$24,938.50 CR	
Retirement phase				\$0.00 
Fund	USI	Account number	Amount	
ANTHONY KELLY OPT PTY LTD SUPERANNUATI ON FUND	00000000000000	SMSF113797102326	\$0.00	
Total superannuation balance as at 30 June 2020			\$659,904.50 CR	

Financial year 2018 - 2019


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

Financial year 2017 - 2018

Type				Amount

Type	Amount
Accumulation phase	\$628,219.40 CR 
Total superannuation balance as at 30 June 2018	\$628,219.40 CR

Financial year 2016 - 2017

Type	Amount
Accumulation phase	\$592,547.20 CR 
Total superannuation balance as at 30 June 2017	\$592,547.20 CR