

**Popovich Superannuation Fund**  
**Transfer Balance Account Summary**



For The Period 01 July 2022 - 30 June 2023

| Member           | Pension Type | Date       | Lodgment Date | Transaction Type | Event Type | Debit | Credit | Balance      | Cap Limit    | Remaining Cap |
|------------------|--------------|------------|---------------|------------------|------------|-------|--------|--------------|--------------|---------------|
| Jane Popovich    | Below Cap    | 01/07/2022 |               | Opening Balance  |            |       |        | 1,228,601.08 | 1,600,000.00 | 371,398.92    |
| Miodrag Popovich | Below Cap    | 01/07/2022 |               | Opening Balance  |            |       |        | 1,411,167.05 | 1,612,000.00 | 200,832.95    |



## Transfer balance cap

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A transfer balance account is used to monitor the super savings transferred into a retirement phase account. Use this information to help plan for retirement by monitoring your current personal transfer balance cap and available cap space. The information displayed on this screen is based on information reported to us. Your personal transfer balance cap is based on the highest ever balance of your transfer balance account and may change if the information we have relied on to calculate it changes.

### Attention

**Available cap space** \$224,832.95

| Description  | Amount         |
|--|----------------|
| Current personal transfer balance cap                  | \$1,636,000.00 |
| <b>Current transfer balance cap</b><br>\$1,636,000.00  |                |
| <b>Highest ever transfer balance</b><br>\$1,411,167.05 |                |
| <b>Indexation entitlement</b><br>Yes                   |                |
| Transfer balance account - view transactions           | \$1,411,167.05 |
| <b>Capped defined benefit balance</b><br>\$0.00        |                |



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### Warning

You're at risk of exceeding the transfer balance cap.

### Attention

**Available cap space** \$0.00

| Description  | Amount         |
|--|----------------|
| Current personal transfer balance cap                  | \$1,600,000.00 |
| <b>Current transfer balance cap</b><br>\$1,600,000.00  |                |
| <b>Highest ever transfer balance</b><br>\$1,600,000.00 |                |
| <b>Indexation entitlement</b><br>No                    |                |
| Transfer balance account - view transactions           | \$1,600,000.00 |
| <b>Capped defined benefit balance</b><br>\$0.00        |                |

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**Australian Government**  
**Australian Taxation Office**

**Agent** THE MACRO GROUP  
**Client** POPOVICH, JANE  
**TFN** 214 931 841

## Transfer balance account - view transactions

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### Information

If you believe that this information has been reported incorrectly, or there are events that have not been reported, please contact your superannuation provider.

| Effective date | Received date | Description                  | Amount            | Balance           |
|----------------|---------------|------------------------------|-------------------|-------------------|
| 11/11/2020     | 22/02/2021    | Superannuation income stream | \$1,600,000.00 CR | \$1,600,000.00 CR |

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### From

POPOVICH SUPERANNUATION FUND

### Account type

Account based income stream

### Account number

POPJAN00001A

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