

WOODVALE SUPERANNUATION FUND

# Transfer Balance Account Summary



For The Period 01 July 2021 - 30 June 2022

Member	Pension Type	Date	Lodgment Date	Transaction Type	Event Type	Debit	Credit	Balance	Cap Limit	Remaining Cap
Jon Dean Grayson	At Limit									
		01/07/2021		Cap Indexation (0.00%) - Highest TBA (1600000.00/ 1600000.00)	N/A				1,600,000.00	0.00
		01/07/2021		Opening Balance				1,600,000.00	1,600,000.00	0.00
Linda Mary Nash	Below Cap									
		01/07/2021		Cap Indexation (81.00%) - Highest TBA (310876.46/ 1600000.00)	N/A				1,681,000.00	1,370,123.54
		01/07/2021		Opening Balance				310,876.46	1,681,000.00	1,370,123.54



**Agent** THE MACRO GROUP  
**Client** GRAYSON, JON  
**TFN** 487 651 461

# Transfer balance cap

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.

## 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
Current transfer balance cap	
\$1,600,000.00	
Highest ever transfer balance	
\$1,600,000.00	
Indexation entitlement	
No	
Transfer balance account - view transactions	\$1,600,000.00
Capped defined benefit balance	
\$0.00	



**Agent** THE MACRO GROUP  
**Client** NASH, LINDA  
**TFN** 484 116 628

# Transfer balance cap

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** \$1,370,123.54

Description	Amount
Current personal transfer balance cap	\$1,681,000.00
Current transfer balance cap	
\$1,681,000.00	
Highest ever transfer balance	
\$310,876.46	
Indexation entitlement	
Yes	
Transfer balance account - view transactions	\$310,876.46
Capped defined benefit balance	
\$0.00	