



Agent DGZ
Client STEPHENSON, MICHELLE
TFN 203 556 234

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 20/10/2022
Total superannuation balance as at 30/06/2022 \$5,366.03

Financial year 2021 - 2022

Accumulation phase **\$5,366.03 CR**

Fund MLC SUPER FUND
USI 70732426024150
Account number 103189989
Amount \$5,366.03 CR

Total superannuation balance as at 30 June 2022 **\$5,366.03 CR**

Financial year 2020 - 2021

Accumulation phase **\$257,220.53 CR**

Fund SHELLDAM SUPER FUND
USI 00000000000000
Account number SMSF115133090581
Amount \$251,109.00 CR

Fund MLC SUPER FUND
USI 70732426024150
Account number 103189989
Amount \$6,111.53 CR

Total superannuation balance as at 30 June 2021 **\$257,220.53 CR**

Retirement phase **\$0.00**

Fund	SHELLDAM SUPER FUND
USI	00000000000000
Account number	SMSF115133090581
Amount	\$0.00

Total superannuation balance as at 30 June 2021 **\$257,220.53 CR**

Financial year 2019 - 2020

Accumulation phase **\$178,986.72 CR**

Fund	SHELLDAM SUPER FUND
USI	00000000000000
Account number	SMSF115133090581
Amount	\$172,199.00 CR

Fund	MLC SUPER FUND
USI	70732426024150
Account number	103189989
Amount	\$6,759.81 CR

Fund	AUSFUND
USI	APF0100AU
Account number	435396717
Amount	\$27.91 CR

Retirement phase **\$0.00**

Fund	SHELLDAM SUPER FUND
USI	00000000000000
Account number	SMSF115133090581
Amount	\$0.00

Total superannuation balance as at 30 June 2020 **\$178,986.72 CR**

Financial year 2018 - 2019

Accumulation phase **\$187,746.82 CR**

Fund	SHELLDAM SUPER FUND
USI	00000000000000
Account number	SMSF115133090581
Amount	\$179,071.77 CR

Fund	MLC SUPER FUND
USI	70732426024150
Account number	103189989
Amount	\$7,331.98 CR

Fund	AUSFUND
USI	APF0100AU
Account number	435396717
Amount	\$1,343.07 CR

Retirement phase	\$0.00
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Fund	SHELLDAM SUPER FUND
USI	00000000000000
Account number	SMSF115133090581
Amount	\$0.00

Total superannuation balance as at 30 June 2019	\$187,746.82 CR
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Financial year 2017 - 2018

Accumulation phase	\$198,206.42 CR
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Fund	MLC SUPER FUND
USI	70732426024150
Account number	103189989
Amount	\$7,199.89 CR

Fund	THE TRUSTEE FOR AUSTRALIANSUPER
USI	STA0100AU
Account number	500056182
Amount	\$1,344.76 CR

Total superannuation balance as at 30 June 2018	\$198,206.42 CR
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Fund	THE TRUSTEE FOR SHELLDAM SUPER FUND
Account number	1
Amount	\$189,661.77 CR

Total superannuation balance as at 30 June 2018	\$198,206.42 CR
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Financial year 2016 - 2017

Accumulation phase	\$102,357.66 CR
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Fund	MLC SUPER FUND
USI	70732426024150
Account number	103189989
Amount	\$101,073.35 CR

Fund	THE TRUSTEE FOR AUSTRALIANSUPER
USI	STA0100AU
Account number	500056182
Amount	\$1,284.31 CR

Total superannuation balance as at 30 June 2017	\$102,357.66 CR
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