



Australian Government
Australian Taxation Office

Agent DGZ
Client PHILPOTT, IVAN
TFN 478 790 492

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 23/02/2022
Total superannuation balance as at 30/06/2020 \$866,031.00

Financial year 2019 - 2020

Accumulation phase	\$0.00
Fund	I & R PHILPOTT FAMILY SUPERANNUATION F
USI	00000000000000
Account number	SMSF115614427020
Amount	\$0.00
Retirement phase	\$866,031.00 CR
Fund	I & R PHILPOTT FAMILY SUPERANNUATION F
USI	00000000000000
Account number	SMSF115614427020
Amount	\$866,031.00 CR
Total superannuation balance as at 30 June 2020	\$866,031.00 CR

Financial year 2018 - 2019

Accumulation phase	\$0.00
Total superannuation balance as at 30 June 2019	\$1,007,185.00 CR

Fund	I & R PHILPOTT FAMILY SUPERANNUATION F
USI	00000000000000
Account number	SMSF115614427020
Amount	\$0.00

Retirement phase **\$1,007,185.00 CR**

Fund	I & R PHILPOTT FAMILY SUPERANNUATION F
USI	00000000000000
Account number	SMSF115614427020
Amount	\$1,007,185.00 CR

Total superannuation balance as at 30 June 2019 **\$1,007,185.00 CR**

Financial year 2017 - 2018

Retirement phase **\$904,225.00 CR**

Fund	THE TRUSTEE FOR I & R PHILPOTT FAMILY SUPERANNUATION FUND
Account number	1
Amount	\$904,225.00 CR

Total superannuation balance as at 30 June 2018 **\$904,225.00 CR**

Financial year 2016 - 2017

Accumulation phase **\$0.00**

Fund	Calculated APV
Amount	\$859,422.32 DR

Fund	THE TRUSTEE FOR I & R PHILPOTT FAMILY SUPERANNUATION FUND
Account number	1
Amount	\$859,422.00 CR

Retirement phase **\$859,422.32 CR**

Total superannuation balance as at 30 June 2017 **\$859,422.32 CR**

Fund	I & R PHILPOTT FAMILY SUPERANNUATION FUND
Account number	506
Amount	\$34,184.77 CR
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Fund	I & R PHILPOTT FAMILY SUPERANNUATION FUND
Account number	507
Amount	\$33,527.40 CR
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Fund	I & R PHILPOTT FAMILY SUPERANNUATION FUND
Account number	510
Amount	\$29,827.22 CR
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Fund	I & R PHILPOTT FAMILY SUPERANNUATION FUND
Account number	503
Amount	\$179,255.10 CR
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Fund	I & R PHILPOTT FAMILY SUPERANNUATION FUND
Account number	504
Amount	\$253,809.42 CR
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Fund	I & R PHILPOTT FAMILY SUPERANNUATION FUND
Account number	508
Amount	\$8,515.27 CR
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Fund	I & R PHILPOTT FAMILY SUPERANNUATION FUND
Account number	501
Amount	\$237,471.66 CR
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Fund	I & R PHILPOTT FAMILY SUPERANNUATION FUND
Account number	509
Amount	\$52,534.02 CR
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Total superannuation balance as at 30 June 2017	\$859,422.32 CR

Fund	I & R PHILPOTT FAMILY SUPERANNUATION FUND
Account number	505
Amount	\$30,297.46 CR
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Total superannuation balance as at 30 June 2017	\$859,422.32 CR