



Australian Government
Australian Taxation Office

Agent DGZ
Client PHILPOTT, IVAN
TFN 478 790 492

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 \$645,618.82

Description	Amount
Current personal transfer balance cap	\$1,638,000.00
Current transfer balance cap	
\$1,638,000.00	
Highest ever transfer balance	
\$992,381.18	
Indexation entitlement	
Yes	
Transfer balance account - view transactions	\$992,381.18
Capped defined benefit balance	
\$0.00	



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Transfer balance account - view transactions

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
17/06/2020	30/03/2021	Superannuation income stream	\$25,000.00 CR	\$992,381.18 CR

From

THE TRUSTEE FOR I & R PHILPOTT FAMILY
SUPERANNUATION FUND

Account type

Account based income stream

Account number

PHIIVA00023P

24/06/2019	02/04/2020	Superannuation income stream	\$63,518.86 CR	\$967,381.18 CR
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From

THE TRUSTEE FOR I & R PHILPOTT FAMILY
SUPERANNUATION FUND

Account type

Account based income stream

Account number

PHIIVA00014P

18/06/2018	13/09/2019	Superannuation income stream	\$3,080.00 CR	\$903,862.32 CR
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Effective date	Received date	Description	Amount	Balance
From				
THE TRUSTEE FOR I & R PHILPOTT FAMILY SUPERANNUATION FUND				
Account type				
Account based income stream				
Account number				
PHIIVA00013P				

11/06/2018	13/09/2019	Superannuation income stream	\$41,360.00 CR	\$900,782.32 CR
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From				
THE TRUSTEE FOR I & R PHILPOTT FAMILY SUPERANNUATION FUND				
Account type				
Account based income stream				
Account number				
PHIIVA00012P				

01/07/2017	27/06/2018	Superannuation income stream	\$52,534.02 CR	\$859,422.32 CR
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From				
I & R PHILPOTT FAMILY SUPERANNUATION FUND				
Account type				
Account based income stream				
Account number				
509				

01/07/2017	27/06/2018	Superannuation income stream	\$253,809.42 CR	\$806,888.30 CR
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From				
I & R PHILPOTT FAMILY SUPERANNUATION FUND				
Account type				
Account based income stream				
Account number				
504				

Effective date	Received date	Description	Amount	Balance
01/07/2017	27/06/2018	Superannuation income stream	\$29,827.22 CR	\$553,078.88 CR

From

I & R PHILPOTT FAMILY SUPERANNUATION FUND

Account type

Account based income stream

Account number

510

01/07/2017	27/06/2018	Superannuation income stream	\$30,297.46 CR	\$523,251.66 CR
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From

I & R PHILPOTT FAMILY SUPERANNUATION FUND

Account type

Account based income stream

Account number

505

01/07/2017	27/06/2018	Superannuation income stream	\$237,471.66 CR	\$492,954.20 CR
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From

I & R PHILPOTT FAMILY SUPERANNUATION FUND

Account type

Account based income stream

Account number

501

01/07/2017	27/06/2018	Superannuation income stream	\$179,255.10 CR	\$255,482.54 CR
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Effective date	Received date	Description	Amount	Balance
From				
I & R PHILPOTT FAMILY SUPERANNUATION FUND				
Account type				
Account based income stream				
Account number				
503				
01/07/2017	27/06/2018	Superannuation income stream	\$33,527.40 CR	\$76,227.44 CR
From				
I & R PHILPOTT FAMILY SUPERANNUATION FUND				
Account type				
Account based income stream				
Account number				
507				
01/07/2017	27/06/2018	Superannuation income stream	\$34,184.77 CR	\$42,700.04 CR
From				
I & R PHILPOTT FAMILY SUPERANNUATION FUND				
Account type				
Account based income stream				
Account number				
506				
01/07/2017	27/06/2018	Superannuation income stream	\$8,515.27 CR	\$8,515.27 CR
From				
I & R PHILPOTT FAMILY SUPERANNUATION FUND				
Account type				
Account based income stream				
Account number				
508				