



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 \$84,821.89

Description	Amount
Current personal transfer balance cap	\$1,605,000.00
Current transfer balance cap \$1,605,000.00	
Highest ever transfer balance \$1,520,178.11	
Indexation entitlement Yes	
Transfer balance account - view transactions	\$1,520,178.11
Capped defined benefit balance \$0.00	



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
28/06/2019	13/07/2020	Superannuation income stream	\$23,926.00 CR	\$1,520,178.11 CR

From

PAT SHEPPARD SUPERANNUATION FUND

Account type

Account based income stream

Account number

SHEPAT00029P

25/06/2018	09/07/2018	Member commutation	\$10,000.00 DR	\$1,496,252.11 CR
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From

SYMETRY PERSONAL RETIREMENT FUND

Account type

Account based income stream

Account number

1638670

19/03/2018	06/04/2018	Member commutation	\$10,000.00 DR	\$1,506,252.11 CR
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From

SYMETRY PERSONAL RETIREMENT FUND

Account type

Account based income stream

Account number

1638670

01/07/2017	27/06/2018	Superannuation income stream	\$702,679.05 CR	\$1,516,252.11 CR
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From

PAT SHEPPARD SUPERANNUATION FUND

Account type

Account based income stream

Account number

514

01/07/2017	12/12/2017	Superannuation income stream	\$813,573.06 CR	\$813,573.06 CR
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Effective date	Received date	Description	Amount	Balance
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From

SYMETRY PERSONAL RETIREMENT FUND

Account type

Account based income stream

Account number

1638670



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