



## Total superannuation balance

Your client's [total superannuation balance](https://www.ato.gov.au/atoo_TSB) (https://www.ato.gov.au/atoo\_TSB) 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** 31/10/2019  
**Total superannuation balance as at 30/06/2018** \$1,829,396.83

### Financial year 2017 - 2018

|                                                        |                                               |
|--------------------------------------------------------|-----------------------------------------------|
| <b>Accumulation phase</b>                              | <b>\$237,205.88 CR</b>                        |
| Fund                                                   | THE TRUSTEE FOR THE LEWIS SUPERANNUATION FUND |
| Account number                                         | 1                                             |
| Amount                                                 | \$237,205.88 CR                               |
| <b>Retirement phase</b>                                | <b>\$1,592,190.95 CR</b>                      |
| Fund                                                   | THE TRUSTEE FOR THE LEWIS SUPERANNUATION FUND |
| Account number                                         | 1                                             |
| Amount                                                 | \$1,592,190.95 CR                             |
| <b>Total superannuation balance as at 30 June 2018</b> | <b>\$1,829,396.83 CR</b>                      |

### Financial year 2016 - 2017

|                                                        |                           |
|--------------------------------------------------------|---------------------------|
| <b>Accumulation phase</b>                              | <b>\$89,316.87 CR</b>     |
| Fund                                                   | LEWIS SUPERANNUATION FUND |
| Account number                                         | ACCUM                     |
| Amount                                                 | \$89,316.87 CR            |
| <b>Total superannuation balance as at 30 June 2017</b> | <b>\$1,689,316.87 CR</b>  |

|                                                        |                           |
|--------------------------------------------------------|---------------------------|
| Fund                                                   | Calculated APV            |
| Amount                                                 | \$1,600,000.00 DR         |
| <hr/>                                                  |                           |
| <b>Retirement phase</b>                                | <b>\$1,600,000.00 CR</b>  |
| <hr/>                                                  |                           |
| Fund                                                   | LEWIS SUPERANNUATION FUND |
| Account number                                         | 14                        |
| Amount                                                 | \$225,539.11 CR           |
| <hr/>                                                  |                           |
| Fund                                                   | LEWIS SUPERANNUATION FUND |
| Account number                                         | 5                         |
| Amount                                                 | \$1,029,520.78 CR         |
| <hr/>                                                  |                           |
| Fund                                                   | LEWIS SUPERANNUATION FUND |
| Account number                                         | 3                         |
| Amount                                                 | \$232,712.57 CR           |
| <hr/>                                                  |                           |
| Fund                                                   | LEWIS SUPERANNUATION FUND |
| Account number                                         | 4                         |
| Amount                                                 | \$112,227.54 CR           |
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| <b>Total superannuation balance as at 30 June 2017</b> | <b>\$1,689,316.87 CR</b>  |