



Australian Government
Australian Taxation Office

Agent MARSH TINCKNELL EASTSIDE

Client RINTEL, JAMES

ABN 23 750 751 717

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 25/08/2022
Total superannuation balance as at 30/06/2021 \$920,840.47

Financial year 2020 - 2021

Accumulation phase	\$920,840.47 CR
Fund	JAK SUPER
USI	00000000000000
Account number	SMSF114924762119
Amount	\$920,840.47 CR

Retirement phase	\$0.00
Fund	JAK SUPER
USI	00000000000000
Account number	SMSF114924762119
Amount	\$0.00

Total superannuation balance as at 30 June 2021	\$920,840.47 CR
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Financial year 2019 - 2020

Accumulation phase	\$823,101.99 CR
Total superannuation balance as at 30 June 2020	\$823,101.99 CR

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Concessional contributions

This screen will display contributions we have determined to be concessional contributions, so that it can be seen how the concessional contributions are tracking against the cap for the year.

Total superannuation balance at 30 June 2021

\$920,840.47

Visit [total superannuation balance](#) to learn more.

Financial year

2021-22

Current as at **25 August 2022**

We currently have no concessional contributions information to display

This may be because:

- We process all contributions through our systems to ensure they are identified correctly before we display them, and this may not have happened yet
- Employer contributions may not be payable
- Contributions may not have been made yet as the employer may pay super quarterly
- The super fund (or funds) have not reported the contribution yet
- The super fund (or funds) may be a defined benefit fund, self-managed super fund or other fund that reports this information annually and does not need to report contributions until **31 October** or later
- Personal details held by the fund (or funds) may be different to the information we hold. Ensure [client details](#) are up to date with both the fund and the ATO

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Carry-forward concessional contributions

This screen will display carry-forward contributions we have determined to be unused concessional contributions from a prior year, so that it can be seen how the concessional contributions are tracking against the cap for the year.

Total superannuation balance at 30 June 2021

\$920,840.47

Visit [total superannuation balance](#) to learn more.

Financial year

2021-22

Current as at **25 August 2022****We currently have no carry-forward concessional contributions information to display**

This may be because:

- We process all contributions through our systems to ensure they are identified correctly before we display them, and this may not have happened yet
- Employer contributions may not be payable
- Contributions may not have been made yet as the employer may pay super quarterly
- The super fund (or funds) have not reported the contribution yet
- The super fund (or funds) may be a defined benefit fund, self-managed super fund or other fund that reports this information annually and does not need to report contributions until **31 October** or later
- Personal details held by the fund (or funds) may be different to the information we hold. Ensure [client details](#) are up to date with both the fund and the ATO



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Bring forward arrangement

Important

- All data is based on information reported to us by your client, or their super funds, and processed through our systems.
- Decisions made with this information can have tax consequences for your client. Your clients can refer to their own records or contact their funds to obtain up-to-date information.

Your bring forward arrangement has ended.

- Your bring forward arrangement was triggered in the 2018-19 financial year.
- Your bring forward cap was \$300,000 with reported contributions of \$0.00.