

Agent MARSH TINCKNELL
Client LEMON, BRETT
TFN 488 239 650

Total superannuation balance

Date generated 18/03/2022

Total superannuation balance as at 30/06/2021 \$0.00

Financial year 2020 - 2021

Accumulation phase **\$0.00**

Fund	MLC SUPER FUND
USI	70732426024902
Account number	8131173
Amount	\$0.00

Total superannuation balance as at 30 June 2021 **\$0.00**

Financial year 2019 - 2020

Accumulation phase **\$68,021.46 CR**

Fund	BCRB AUSTRALIA SUPERANNUATION FUND
USI	0000000000000000
Account number	SMSF120793055967
Amount	\$68,021.46 CR

Fund	MLC SUPER FUND
USI	70732426024902
Account number	8131173
Amount	\$0.00

Retirement phase **\$0.00**

Total superannuation balance as at 30 June 2020 **\$68,021.46 CR**

Fund	BCRB AUSTRALIA SUPERANNUATION FUND
USI	0000000000000000
Account number	SMSF120793055967
Amount	\$0.00

Total superannuation balance as at 30 June 2020	\$68,021.46 CR
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Financial year 2018 - 2019

Accumulation phase	\$50,519.77 CR
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Fund	MLC SUPER FUND
USI	70732426024103
Account number	17159449
Amount	\$17,481.26 CR

Fund	MLC SUPER FUND
USI	70732426024902
Account number	8131173
Amount	\$63.83 CR

Fund	JMAC FOR THE AUSTRALIAN ERF
USI	81932639940211
Account number	03179117
Amount	\$5,053.70 CR

Fund	SUNSUPER SUPERANNUATION FUND
USI	98503137921001
Account number	901219641_SOL
Amount	\$27,920.98 CR

Total superannuation balance as at 30 June 2019	\$50,519.77 CR
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Financial year 2017 - 2018

Accumulation phase	\$43,982.46 CR
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Total superannuation balance as at 30 June 2018	\$43,982.46 CR
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Fund	MLC SUPER FUND
USI	70732426024103
Account number	17159449
Amount	\$16,200.42 CR
Fund	THE TRUSTEE FOR AUSTRALIAN ELIGIBLE ROLLOVER FUND
USI	81932639940211
Account number	03179117
Amount	\$4,919.71 CR
Fund	THE TRUSTEE FOR SUNSUPER SUPERANNUATION FUND
USI	98503137921001
Account number	901219641
Amount	\$22,862.33 CR
Total superannuation balance as at 30 June 2018	\$43,982.46 CR

Financial year 2016 - 2017

Accumulation phase	\$36,346.88 CR
Fund	MLC SUPER FUND
USI	70732426024103
Account number	17159449
Amount	\$14,787.99 CR
Fund	THE TRUSTEE FOR SUNSUPER SUPERANNUATION FUND
USI	98503137921001
Account number	901219641
Amount	\$16,802.47 CR
Fund	THE TRUSTEE FOR AUSTRALIAN ELIGIBLE ROLLOVER FUND
USI	81932639940211
Account number	03179117
Amount	\$4,756.42 CR
Total superannuation balance as at 30 June 2017	\$36,346.88 CR

Fund	THE TRUSTEE FOR MLC SUPER FUND
USI	70732426024902
Account number	8131173
Amount	\$0.00

Total superannuation balance as at 30 June 2017	\$36,346.88 CR
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Concessional contributions

These are contributions that are made into the super fund **before tax**. They are taxed at a rate of 15% in the super fund.

Super funds report the contributions to us and we determine whether they are concessional contributions.

The decisions made with this information can have tax consequences. We recommend independent financial advice specific to individual circumstances is obtained.

Total superannuation balance at 30 June 2020

\$68,021.46

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

Financial year

2020-21



Current as at **14 March 2022**

Remaining concessional contributions Cap available

\$25,000.00

Contributions are **within** the concessional contributions cap. If the concessional contributions cap is exceeded and the exceeded amount is not released, **more tax** may be due.

Description	Amount
Annual concessional contributions cap	\$25,000.00
Concessional contributions	\$0.00
Unused carry-forward concessional contributions applied from previous year(s)	\$0.00
Remaining concessional contributions cap	\$25,000.00

Further considerations

- > Concessional contributions may not be reported until 31 October for members of a defined benefit fund.
- > Concessional contributions made to a self-managed fund will not be displayed until we have received and processed the annual return.
- > Concessional contributions will affect additional tax on contributions under [Division 293](#).
- > Refer to previous records or contact the fund (or funds) after 31 October to obtain more up-to-date information.

Employer contributions

Only contributions paid by your employer from **1 July 2018** are displayed.

If an employer is not listed:

- > the due date for the employer to pay contributions may not have passed
- > the fund may not be required to report employer contributions to us.

Refer to the fund's online portal or contact the employer if you believe employer contributions should be displayed.


Financial year

2020-21 (previous)




Contributions (financial year 2020-21)

\$0.00

-  > Last receipt date – The last date the fund received a contribution payment from the employer.
- > Reported – The total of all employer contributions reported to the fund by the employer.


MLC Protection Life and Income

Not provided

-  > Last receipt date – The last date the fund received a contribution payment from the employer.
- > Reported – The total of all employer contributions reported to the fund by the employer.


THE TRUSTEE FOR BCRB AUSTRALIA SUPERANNUATION FUND

Not provided

-  > Last receipt date – The last date the fund received a contribution payment from the employer.
- > Reported – The total of all employer contributions reported to the fund by the employer.


MLC MasterKey Superannuation (Closed)

Not provided

-  > Last receipt date – The last date the fund received a contribution payment from the employer.
- > Reported – The total of all employer contributions reported to the fund by the employer.

Australian Retirement Trust (previously Sunsuper) (Closed)

Not provided

-  > Last receipt date – The last date the fund received a contribution payment from the employer.
- > Reported – The total of all employer contributions reported to the fund by the employer.

(Closed)

Not provided

Carry-forward concessional contributions

If the annual concessional contributions cap for the current year is exceeded, unused concessional contributions may be carried forward if the [eligibility criteria](#) is met.

The eligibility criteria to carry forward the unused concessional contributions has been met as the total superannuation balance is less than **\$500,000.00** at the end of 30 June of the previous financial year. Additional catch-up concessional contributions to the super fund(s) may be made.

The decisions that are made with this information can have tax consequences. We recommend that financial advice is obtained.

Total superannuation balance at 30 June 2020

\$68,021.46

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

Financial year

2020-21



Current as at **14 March 2022**

Unused concessional contributions available to carry forward

Eligible

\$16,590.51

Eligible to carry forward unused concessional contributions cap because the total superannuation balance is less than **\$500,000.00** at the end of 30 June 2020.

2020-21 financial year

Description	Amount
Total carry-forward concessional contributions cap	\$50,000.00
Concessional contributions	\$33,409.49
Unused concessional contributions cap available to carry forward	\$16,590.51

Previous financial years

Financial year	Concessional contributions cap	Concessional contributions	Unused concessional contributions cap
01/07/2019 - 30/06/2020	\$25,000.00	\$29,638.59	\$0.00
01/07/2018 - 30/06/2019	\$25,000.00	\$3,770.90	\$16,590.51

Further considerations

- > Concessional contributions may not be reported until 31 October for members of a defined benefit fund.
- > Concessional contributions made to a self-managed fund will not be displayed until we have received and processed the annual return.
- > Concessional contributions will affect additional tax on contributions under [Division 293](#).
- > Refer to previous records or contact the fund (or funds) after 31 October to obtain more up-to-date information.