



Fund details

Fund name	THE TRUSTEE FOR COLONIAL FIRST STATE-FIRSTCHOICE SUPERANNUATION TRUST
Fund ABN	26458298557
Unique superannuation identifier (USI)	26458298557008
Balance	\$0.00
As at	30/06/2021
Date reported	30 June 2021
Account opened	01 December 1998
Member account number	00617731
Recent contribution	Yes
Insurance	Yes

Fund name	THE TRUSTEE FOR EDMONDS FAMILY SUPERANNUATION FUND
Balance	\$478,405.11
As at	30/06/2020
Date reported	30 June 2020
Account opened	01 August 2003
Member account number	SMSF114786552353
Recent contribution	No
Insurance	Unknown

Fund name	THE TRUSTEE FOR MLC SUPER FUND
Fund ABN	70732426024
Unique superannuation identifier (USI)	70732426024100
Balance	\$17,051.85
As at	30/06/2021
Date reported	30 June 2021
Account opened	03 February 1997
Member account number	20132922
Recent contribution	No
Insurance	Yes
Fund website	http://mlc.com.au

Fund name	THE TRUSTEE FOR NATIONAL MUTUAL RETIREMENT FUND
Fund ABN	76746741299
Unique superannuation identifier (USI)	76746741299019
Balance	\$929.50
As at	30/06/2021
Date reported	30 June 2021
Account opened	27 July 1988
Member account number	Q8636288-Q
Recent contribution	No
Insurance	Yes

Reported super balance	\$496,386.46
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Closed account name	Date closed
THE TRUSTEE FOR TAL SUPERANNUATION AND INSURANCE FUND	28 October 2019

Manage your contributions

'Reported super balance' may be different to your 'total superannuation balance'. To view your total superannuation balance, go to Contribution details.



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	21/03/2022
Total superannuation balance as at 30/06/2021	\$17,981.35

Financial year 2020 - 2021

Accumulation phase	\$17,981.35 CR
Fund	COLONIAL FIRST STATE FIRSTCHOICE SUPERANNUATION TRUST
USI	26458298557008
Account number	00617731
Amount	\$0.00
Fund	MLC SUPER FUND
USI	70732426024100
Account number	20132922
Amount	\$17,051.85 CR
Fund	NATIONAL MUTUAL RETIREMENT FUND
USI	76746741299019
Account number	Q8636288-Q
Amount	\$929.50 CR
Total superannuation balance as at 30 June 2021	\$17,981.35 CR

Financial year 2019 - 2020

Accumulation phase	\$494,124.63 CR
Fund	COLONIAL FIRST STATE FIRSTCHOICE SUPERANNUATION TRUST
USI	26458298557008
Account number	00617731
Amount	\$0.00
Fund	MLC SUPER FUND
USI	70732426024100
Account number	20132922
Amount	\$14,827.32 CR
Fund	NATIONAL MUTUAL RETIREMENT FUND
USI	76746741299019
Account number	Q8636288-Q
Amount	\$892.20 CR
Fund	EDMONDS FAMILY SUPERANNUATION FUND
USI	00000000000000
Account number	SMSF114786552353
Amount	\$478,405.11 CR
Retirement phase	\$0.00
Fund	EDMONDS FAMILY SUPERANNUATION FUND
USI	00000000000000
Account number	SMSF114786552353
Amount	\$0.00
Total superannuation balance as at 30 June 2020	\$494,124.63 CR

Financial year 2018 - 2019

Accumulation phase	\$492,230.94 CR
Total superannuation balance as at 30 June 2019	\$492,230.94 CR

Fund	TAL SUPERANNUATION AND INSURANCE FUND
USI	20891605180001
Account number	7102000279
Amount	\$5,775.79 CR
Fund	COLONIAL FIRST STATE FIRSTCHOICE SUPERANNUATION TRUST
USI	26458298557008
Account number	00617731
Amount	\$0.00
Fund	MLC SUPER FUND
USI	70732426024100
Account number	20132922
Amount	\$11,522.07 CR
Fund	AMP SUPERANNUATION SAVINGS TRUST
USI	76514770399003
Account number	Q8636288-Q
Amount	\$856.40 CR
Fund	EDMONDS FAMILY SUPERANNUATION FUND
USI	00000000000000
Account number	SMSF114786552353
Amount	\$474,076.68 CR
Retirement phase	\$0.00
Fund	EDMONDS FAMILY SUPERANNUATION FUND
USI	00000000000000
Account number	SMSF114786552353
Amount	\$0.00
Total superannuation balance as at 30 June 2019	\$492,230.94 CR

Financial year 2017 - 2018

Accumulation phase	\$486,491.35 CR
Total superannuation balance as at 30 June 2018	\$486,491.35 CR

Fund	MLC SUPER FUND
USI	70732426024100
Account number	20132922
Amount	\$11,326.21 CR
Fund	THE TRUSTEE FOR EDMONDS FAMILY SUPERANNUATION FUND
Account number	2
Amount	\$468,853.38 CR
Fund	THE TRUSTEE FOR TAL SUPERANNUATION AND INSURANCE FUND
USI	20891605180001
Account number	7102000279
Amount	\$5,489.56 CR
Fund	THE TRUSTEE FOR AMP SUPERANNUATION SAVINGS TRUST
USI	76514770399003
Account number	Q8636288-Q
Amount	\$822.20 CR
Total superannuation balance as at 30 June 2018	
	\$486,491.35 CR

Financial year 2016 - 2017

Accumulation phase	\$454,585.60 CR
Fund	MLC SUPER FUND
USI	70732426024100
Account number	20132922
Amount	\$11,314.47 CR
Fund	THE TRUSTEE FOR TAL SUPERANNUATION AND INSURANCE FUND
USI	20891605180001
Account number	7102000279
Amount	\$5,162.14 CR
Total superannuation balance as at 30 June 2017	
	\$454,585.60 CR

Fund	THE TRUSTEE FOR EDMONDS FAMILY SUPERANNUATION FUND
Account number	2
Amount	\$437,319.39 CR
Fund	THE TRUSTEE FOR COLONIAL FIRST STATE- FIRSTCHOICE SUPERANNUATION TRUST
USI	26458298557008
Account number	L400 00617731
Amount	\$0.00
Fund	THE TRUSTEE FOR COLONIAL SUPER RETIREMENT FUND
USI	40328908469340
Account number	L400 00617731
Amount	\$0.00
Fund	THE TRUSTEE FOR AMP SUPERANNUATION SAVINGS TRUST
USI	76514770399003
Account number	Q8636288-Q
Amount	\$789.60 CR
Total superannuation balance as at 30 June 2017	\$454,585.60 CR



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 2019

\$492,230.94

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

Financial year

2019-20



Current as at **14 March 2022**

Remaining concessional contributions Cap available

\$14,171.91

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 in SMSF	\$10,828.09
Unused carry-forward concessional contributions applied from previous year(s)	\$0.00
Remaining concessional contributions cap	\$14,171.91

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.



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

\$494,124.63

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.

THE TRUSTEE FOR EDMONDS FAMILY 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.

Total Care Plan Super


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 Business Super (including MLC MasterKey Personal Super)

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.


AMP Conventional - Endowment

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 AMP SUPERANNUATION SAVINGS TRUST (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.

THE TRUSTEE FOR TAL SUPERANNUATION AND INSURANCE FUND (Closed)

Not provided

From 20FY



Australian Government
Australian Taxation Office

Agent ALTUS PARTNERS
Client GLENN EDMONDS
TFN 489571017

Concessional contributions

Decisions made with this information can have tax consequences.

The contributions data that appears on this screen has been reported to us by your client's super fund (or funds), and we have determined them to be concessional contributions.

There is a cap on the amount of concessional contributions your client can make to their super fund (or funds) each financial year without paying extra tax.

Financial year

2018-19



Your client is within their concessional contributions cap

Annual concessional contributions cap	\$25,000.00
Contributions counting towards your client's concessional contributions cap from SMSF	\$11,825.53
Unused concessional contributions cap for this year	\$13,174.47

Key messages:

- > Your client may also have unused [carry forward concessional contributions](#) cap amounts from a previous year (or years)
- > Concessional contributions made to a self-managed super fund will not be displayed until we have received and processed the annual return.
- > Refer your client to their own records or contact their fund (or funds) (after 31 October) to obtain more up-to-date information. You may also like to recommend they seek professional advice.

Data last updated **13 February 2021**



Australian Government

Australian Taxation Office

Agent ALTUS PARTNERS

Client EDMONDS, GLENN

TFN 489 571 017

Employer contributions

THE TRUSTEE FOR EDMONDS FAMILY SUPERANNUATION FUND

Employer	Not reported	
ABN	Not reported	
Last receipt date	30/06/2019	
Reported	\$11,825.53	
Contribution type	Last receipt date	Year to date total
Contribution typeAward	Last receipt dateNot reported	Year to date totalNot reported
Contribution typeEmployer voluntary	Last receipt dateNot reported	Year to date totalNot reported
Contribution typeSalary sacrifice	Last receipt dateNot reported	Year to date totalNot reported
Contribution typeSuper guarantee	Last receipt dateNot reported	Year to date totalNot reported
Contribution typeEmployer contributions	Last receipt date 30/06/2019	Year to date total \$11,825.53