

Fund details

| | |
|------------------------------|---|
| Fund name | THE TRUSTEE FOR CHICKEN GEORGE SUPER FUND |
| Balance | \$300,190.45 |
| As at | 30/06/2020 |
| Date reported | 30 June 2020 |
| Account opened | 15 August 2016 |
| Member account number | SMSF114396711791 |
| Recent contribution | No |
| Insurance | Unknown |

| | |
|-------------------------------|--------------|
| Reported super balance | \$300,190.45 |
|-------------------------------|--------------|

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 04/04/2022
Total superannuation balance as at 30/06/2020 \$300,190.45

Financial year 2019 - 2020

| | |
|--|---------------------------|
| Accumulation phase | \$300,190.45 CR |
| Fund | CHICKEN GEORGE SUPER FUND |
| USI | 00000000000000 |
| Account number | SMSF114396711791 |
| Amount | \$300,190.45 CR |
| Retirement phase | \$0.00 |
| Fund | CHICKEN GEORGE SUPER FUND |
| USI | 00000000000000 |
| Account number | SMSF114396711791 |
| Amount | \$0.00 |
| Total superannuation balance as at 30 June 2020 | \$300,190.45 CR |

Financial year 2018 - 2019

| | |
|--|------------------------|
| Accumulation phase | \$373,593.85 CR |
| Total superannuation balance as at 30 June 2019 | \$373,593.85 CR |

| | |
|--|---------------------------|
| Fund | CHICKEN GEORGE SUPER FUND |
| USI | 00000000000000 |
| Account number | SMSF114396711791 |
| Amount | \$373,593.85 CR |
| Retirement phase | \$0.00 |
| Fund | CHICKEN GEORGE SUPER FUND |
| USI | 00000000000000 |
| Account number | SMSF114396711791 |
| Amount | \$0.00 |
| Total superannuation balance as at 30 June 2019 | \$373,593.85 CR |

Financial year 2017 - 2018

| | |
|--|---|
| Accumulation phase | \$716,716.92 CR |
| Fund | THE TRUSTEE FOR CHICKEN GEORGE SUPER FUND |
| Account number | 1 |
| Amount | \$716,716.92 CR |
| Total superannuation balance as at 30 June 2018 | \$716,716.92 CR |

Financial year 2016 - 2017

| | |
|--|---|
| Accumulation phase | \$159,661.74 CR |
| Fund | THE TRUSTEE FOR CHICKEN GEORGE SUPER FUND |
| Account number | 1 |
| Amount | \$157,185.20 CR |
| Fund | THE TRUSTEE FOR AUSTRALIANSUPER |
| USI | STA0100AU |
| Account number | 1072216758 |
| Amount | \$2,476.54 CR |
| Total superannuation balance as at 30 June 2017 | \$159,661.74 CR |



Australian Government
Australian Taxation Office

Agent MARSH TINCKNELL PTY LTD
Client ANDREW TOMLIN

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 2020

\$300,190.45

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

Financial year

2020-21



[see below](#)

Current as at **04 April 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



Australian Government
Australian Taxation Office

Agent MARSH TINCKNELL PTY LTD
Client ANDREW TOMLIN

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 2020

\$300,190.45

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

Financial year

2020-21



Current as at **04 April 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



Australian Government
Australian Taxation Office

Agent MARSH TINCKNELL PTY LTD
Client ANDREW TOMLIN

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 CHICKEN GEORGE SUPER FUND

Not provided



Australian Government
Australian Taxation Office

Agent MARSH TINCKNELL PTY LTD
Client ANDREW TOMLIN

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

\$373,593.85

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

Financial year

2019-20



Current as at **07 November 2020**

Remaining concessional contributions Cap not available

\$0.00

correct

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.

Treatment of the contributions

- **\$12,570.00** has been claimed as a [personal super contributions](#) deduction. This has been treated as a concessional contribution.

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.



Australian Government
Australian Taxation Office

Agent MARSH TINCKNELL PTY LTD
Client ANDREW TOMLIN

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 2018

\$716,716.92

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

Financial year

2018-19



Current as at **07 November 2020**

Remaining concessional contributions Cap available

\$8,477.35

correct

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.

Treatment of the contributions

- **\$3,600.00** has been claimed as a [personal super contributions](#) deduction. This has been treated as a concessional contribution.

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.



Australian Government
Australian Taxation Office

Agent MARSH TINCKNELL PTY LTD
Client ANDREW TOMLIN

Non-concessional contributions

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

Total superannuation balance at 30 June 2020

\$300,190.45

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

Financial year

2020-21



Current as at **04 April 2022**



We currently have no non-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
- > 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



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.


You are not in a bring forward arrangement.




Australian Government
Australian Taxation Office

Agent MARSH TINCKNELL PTY LTD
Client ANDREW TOMLIN

Transfer balance cap

 Most transactions are reported to us by your super providers. There are some events you need to report to us, including any loss of super from fraud or dishonesty, bankruptcy payments and family law payment splits. You also need to report personal injury super contributions made prior to 1 July 2007. To report these to us, use the [Transfer balance account event form](#).

 No transactions were found. If you believe this is incorrect, contact your super provider to check whether they have reported this information to us.