




Agent HILLMAN BROTHERS PTY LTD
Client OSBORNE, BRUCE
TFN 117 524 299

Fund details

Fund name	OSBORNE SUPERANNUATION FUND
Balance	\$495,883.55
As at	30/06/2021
Date reported	30 June 2021
Account opened	09 January 2007
Member account number	SMSF116075334172 
Recent contribution	No
Insurance	Unknown
Reported super balance	\$495,883.55

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



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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 01/08/2022
 Total superannuation balance as at 30/06/2021 \$495,883.55

Financial year 2020 - 2021

Accumulation phase	\$0.00
Fund	OSBORNE SUPERANNUATION FUND
USI	00000000000000
Account number	SMSF116075334172
Amount	\$0.00
Retirement phase	\$495,883.55 CR
Fund	OSBORNE SUPERANNUATION FUND
USI	00000000000000
Account number	SMSF116075334172
Amount	\$495,883.55 CR
Total superannuation balance as at 30 June 2021	\$495,883.55 CR

Financial year 2019 - 2020

Accumulation phase	\$0.00
Fund	OSBORNE SUPERANNUATION FUND
USI	00000000000000
Account number	SMSF116075334172
Amount	\$0.00
Retirement phase	\$253,459.88 CR
Fund	OSBORNE SUPERANNUATION FUND
USI	00000000000000
Account number	SMSF116075334172
Amount	\$253,459.88 CR
Total superannuation balance as at 30 June 2020	\$253,459.88 CR

Financial year 2018 - 2019

Accumulation phase	\$0.00
Fund	OSBORNE SUPERANNUATION FUND
USI	00000000000000
Account number	SMSF116075334172
Amount	\$0.00
Retirement phase	\$281,125.69 CR
Fund	OSBORNE SUPERANNUATION FUND
USI	00000000000000
Account number	SMSF116075334172
Amount	\$281,125.69 CR
Total superannuation balance as at 30 June 2019	\$281,125.69 CR

Financial year 2017 - 2018

Retirement phase	\$256,651.56 CR
Fund	OSBORNE SUPERANNUATION FUND
Account number	1
Amount	\$256,651.56 CR
Total superannuation balance as at 30 June 2018	\$256,651.56 CR

Financial year 2016 - 2017

Accumulation phase	\$0.00
Fund	OSBORNE SUPERANNUATION FUND
Account number	ACCUM
Amount	\$0.00
Retirement phase	\$244,911.31 CR
Fund	OSBORNE SUPERANNUATION FUND
Account number	1
Amount	\$244,911.31 CR
Total superannuation balance as at 30 June 2017	\$244,911.31 CR



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Transfer balance account - view transactions

Information

If you believe that this information has been reported incorrectly, or there are events that have not been reported, please contact your superannuation provider.

Effective date	Received date	Description	Amount	Balance
09/12/2020	22/04/2022	Superannuation income stream	\$100,000.00 CR	\$344,911.31 CR

From
OSBORNE SUPERANNUATION FUND

Account type
Account based income stream

Account number
2

01/07/2017	18/05/2020	Superannuation income stream	\$244,911.31 CR	\$244,911.31 CR
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From
OSBORNE SUPERANNUATION FUND

Account type
Account based income stream

Account number
1



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Transfer balance cap

A transfer balance account is used to monitor the super savings transferred into a retirement phase account. Use this information to help plan for retirement by monitoring your current personal transfer balance cap and available cap space. The information displayed on this screen is based on information reported to us. Your personal transfer balance cap is based on the highest ever balance of your transfer balance account and may change if the information we have relied on to calculate it changes.

Attention

Available cap space \$1,334,088.69

Description	Amount
Current personal transfer balance cap	\$1,679,000.00
Current transfer balance cap	
\$1,679,000.00	
Highest ever transfer balance	
\$344,911.31	
Indexation entitlement	
Yes	
Transfer balance account - view transactions	\$344,911.31
Capped defined benefit balance	
\$0.00	