



**Australian Government**  
**Australian Taxation Office**

A handwritten signature in blue ink, appearing to be 'lg'.

**Agent** MARSH TINCKNELL PTY LTD  
**Client** LUU, CHAU

## Fund details

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<b>Fund name</b>	THE TRUSTEE FOR LUUTRAN SUPERANNUATION FUND
<b>Balance</b>	\$502,088.93
<b>As at</b>	30/06/2019
<b>Date reported</b>	30 June 2019
<b>Account opened</b>	01 January 2012
<b>Member account number</b>	SMSF119076572300
<b>Recent contribution</b>	No
<b>Insurance</b>	Unknown

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<b>Your super</b>	\$502,088.93
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### Manage your contributions

'Your super' 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** 29/06/2021  
**Total superannuation balance as at 30/06/2019** \$502,088.93

### Financial year 2018 - 2019

<b>Accumulation phase</b>	<b>\$502,088.93 CR</b>
Fund	LUUTRAN SUPERANNUATION FUND
USI	00000000000000
Account number	SMSF119076572300
Amount	\$502,088.93 CR
<b>Retirement phase</b>	<b>\$0.00</b>
Fund	LUUTRAN SUPERANNUATION FUND
USI	00000000000000
Account number	SMSF119076572300
Amount	\$0.00
<b>Total superannuation balance as at 30 June 2019</b>	<b>\$502,088.93 CR</b>

### Financial year 2017 - 2018

<b>Accumulation phase</b>	<b>\$450,716.31 CR</b>
<b>Total superannuation balance as at 30 June 2018</b>	<b>\$450,716.31 CR</b>

Fund	THE TRUSTEE FOR LUUTRAN SUPERANNUATION FUND
Account number	1
Amount	\$450,716.31 CR
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<b>Total superannuation balance as at 30 June 2018</b>	<b>\$450,716.31 CR</b>

#### Financial year 2016 - 2017

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<b>Accumulation phase</b>	<b>\$414,858.59 CR</b>
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Fund	THE TRUSTEE FOR LUUTRAN SUPERANNUATION FUND
Account number	1
Amount	\$414,858.59 CR
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<b>Total superannuation balance as at 30 June 2017</b>	<b>\$414,858.59 CR</b>



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## Concessional contributions

This screen will display contributions we have determined to be concessional contributions, so that your client can see how they are tracking against their concessional contributions cap for the year.

Financial year

2019-20



### 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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## 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

2019-20 (previous)



### Contributions (financial year 2019-20)

\$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 LUUTRAN SUPERANNUATION FUND

*Not provided*



## Carry forward 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.

Your client's [total superannuation balance](#) affects their [unused concessional contributions cap](#).

Financial year

2019-20



**Your client has unused concessional contributions cap. Check if they are eligible.**

Total carry forward concessional contributions cap	\$25,000.00
Concessional contributions counting towards your client's cap	\$24,999.43
<b>Unused concessional contributions cap available to carry forward</b>	<b>\$0.57</b>

### Key messages:

- > If your client's ~~Total superannuation balance~~ is:
  - > less than \$500,000 on 30 June of the previous financial year, they are eligible to carry forward their unused concessional contributions.
  - > \$500,000 or more on 30 June of the previous financial year, they are not eligible to carry forward their unused concessional contributions.
- > If your client makes concessional contributions in excess of their annual cap for the current year, they may be able to use their carry forward amounts (if they meet the eligibility criteria).
- > Concessional contributions made to a self-managed super fund will not be displayed until reported to us in 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.

Financial year period	Concessional contributions cap	Contributions counting towards your client's cap	Unused concessional contributions cap
01/07/2018 - 30/06/2019	\$25,000.00	\$24,999.43	\$0.57

Data last updated **07 November 2020**



## 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	\$24,999.43
<b>Unused concessional contributions cap for this year</b>	<b>\$0.57</b>

### 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 **07 November 2020**



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## Bring forward arrangement

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### 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.







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**Client** CHAU LUU

## Transfer balance cap

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 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.