



Australian Government
Australian Taxation Office

Name
TFN 546028578

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.



There is excess transfer balance and money needs to be commuted out of the account based super income stream accounts. The sooner you act the less tax will be applied. Refer to the determination notice we sent for details of what needs to be done.

Available cap space

\$0.00

Description	Amount	
Your current personal transfer balance cap	\$1,600,000.00	✓
Transfer balance account - view transactions	\$2,665,163.34	✓

Excess transfer balance amount

\$1,065,163.34

Go to the [election form landing page](#) to review your default provider.



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Total superannuation balance

! Important

- > All data is based on information reported to us by you, or your super funds, and processed through our systems.
- > Decisions made with this information can have tax consequences. Refer to your own records or contact your funds to obtain more up-to-date information. You may also like to seek professional advice.

Your [total superannuation balance](#) is used to determine your eligibility to make contributions, receive co-contributions, and your spouse's eligibility to claim a tax offset for spouse contributions. For self-managed, or small APRA funds, the trustee will also use all members' total superannuation balances to determine whether the segregated assets method can be used to calculate exempt pension income.

Total superannuation balance as at 30/06/2021

\$0.00

Current

History

Total superannuation balance details for previous financial years.

Financial year 2019 - 2020

Type	Amount	
Accumulation phase	\$0.00	✓
Retirement phase	\$2,135,561.78 CR	✓
Total superannuation balance as at 30 June 2020		\$2,135,561.78 CR

Financial year 2018 - 2019

Type	Amount	
Accumulation phase	\$0.00	✓
Retirement phase	\$924,350.60 CR	✓
Total superannuation balance as at 30 June 2019		\$924,350.60 CR

Financial year 2017 - 2018

Type	Amount	
Accumulation phase	\$104,031.88 CR	✓
Retirement phase	\$998,368.54 CR	✓
Total superannuation balance as at 30 June 2018		\$1,102,400.42 CR

Financial year 2016 - 2017

Type	Amount	
Accumulation phase	\$96,111.79 CR	✓
Retirement phase	\$973,639.70 CR	✓
Total superannuation balance as at 30 June 2017		\$1,069,751.49 CR