

# Individual's view online – Under the transfer balance cap

The screenshot shows the Australian Taxation Office (ATO) online portal. The user is logged in and viewing the 'Super' section. A dropdown menu is open under 'Super', showing options like 'Fund details', 'Information', 'Manage', 'Small Business Super', and 'Clearing House'. The 'Information' option is selected, leading to a page titled 'Transfer balance cap'. The page displays the 'Available cap space' as \$286,439.00. Below this, there is a table with the following data:

Description	Amount
Transfer balance cap	\$1,600,000.00
<a href="#">Transfer balance</a>	\$1,313,561.00
<b>Capped defined benefit balance</b>	\$0.00

At the bottom of the page, there is a 'Print friendly version' button.

To display transfer balance cap information select:

To display

# Individual's view online – Under the cap – event summary – single event

## Transfer balance

**i** 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](#).




To display more information

Transactions					Download
Effective date	Received date	Description	Amount	Balance	
01/07/2017	22/12/2017	Superannuation income stream	\$1,313,561.00 CR	\$1,313,561.00	✓

To download event details to print or email to an advisor or agent

# Individual's view online – Under the cap – event summary – account based pension event

 Australian Government  
Australian Taxation Office

Home Tax Super My profile [Redacted] [User Icon]

## Transfer balance

**i** 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](#).

**?** Help

Transactions		Download		
Effective date <b>?</b>	Received date <b>?</b>	Description	Amount <b>?</b>	Balance
01/07/2017	02/08/2018	Superannuation income stream	\$1,600,000.00 CR	\$1,600,000.00 <b>^</b>

**From**  
[Redacted]

**Account type**  
Account based income stream

**Account number**  
[Redacted]

# Individual's view online – Under the cap – event summary – multiple events



## Transfer balance

**i** 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](#).



Transactions Download

Effective date	Received date	Description	Amount	Balance
13/11/2017	12/12/2017	Superannuation income stream	\$1,650,000.00 CR	\$1,599,994.49 ✓
09/11/2017	12/12/2017	Member commutation	\$1,650,005.51 DR	\$50,005.51 ↗

**From**  
[Redacted]  
**Account type**  
Account based income stream  
**Account number**  
[Redacted]



01/07/2017	12/12/2017	Superannuation income stream	\$1,600,000.00 CR	\$1,600,000.00 ↗
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**From**  
[Redacted]  
**Account type**  
Account based income stream  
**Account number**  
1

# Individual's view online – Multiple income streams (including capped defined benefit income stream) event summary

Australian Government  
Australian Taxation Office

Home Tax Super My profile [Redacted]

## Transfer balance

*i* 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](#).

Help

Transactions					Download
Effective date	Received date	Description	Amount	Balance	
15/05/2018	06/06/2018	Member commutation	\$15,800.00 DR	\$1,469,597.63	▼
01/07/2017	13/02/2018	Superannuation income stream	\$1,306,762.57 CR	\$1,485,197.63	▲

**From**  
[Redacted]

**Account type**  
Capped defined benefit income stream just before 1 July 2017

**Account number**  
[Redacted]

01/07/2017	15/12/2017	Superannuation income stream	\$178,435.06 CR	\$178,435.06	▲
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**From**  
[Redacted]

**Account type**  
Account based income stream

**Account number**  
[Redacted]

Click on the chevron to display transaction details