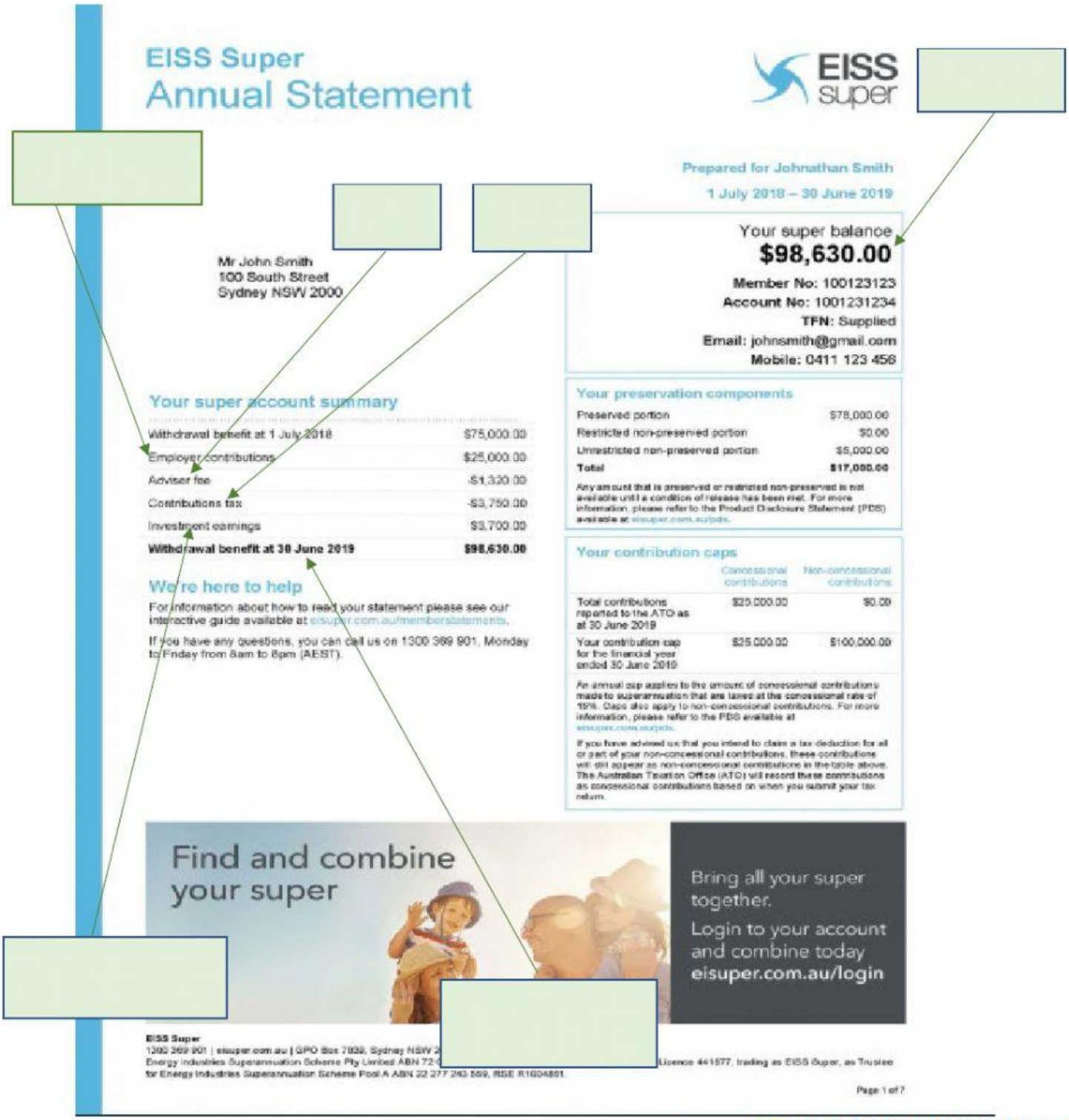
Module 3: Superannuation

Label the Superannuation Statement below by typing the terms into the blank boxes.:

Balances	Check the balance at the start and end of the year. If the balance looks wrong or you're just not sure, contact your super fund straight away.
Employer's payments	Make sure you received your entire super from your employer.
Extra contributions	Be sure any extra money you paid into your super account is included.
Fees	Make sure you're not overpaying because that can really eat away at your super over time. If you're not happy with the fees you're paying, consider changing super funds.
Insurance	Check you are covered for the right amount of insurance through super. This may include death, disability, and income protection insurance.
Tax	Ensure you are being taxed at the correct rate for contributions. For employer and salary-sacrificed contributions this is 15%.
Investments	Make sure you're keeping track of the investment options you chose and all returns are being credited to your account. Returns could be positive or negative.



EISS Super
Annual Statement

EISS super

Prepared for Johnathan Smith
1 July 2018 – 30 June 2019

Mr John Smith
100 South Street
Sydney NSW 2000

Your super balance
$98,630.00
Member No: 100123123
Account No: 1001231234
TFN: Supplied
Email: johnsmith@gmail.com
Mobile: 0411 123 456

Your super account summary

Withdrawal benefit at 1 July 2018	$75,000.00
Employer contributions	$25,000.00
Adviser fee	-$1,320.00
Contributions tax	-$3,750.00
Investment earnings	$3,700.00
Withdrawal benefit at 30 June 2019	**$98,630.00**

Your preservation components

Preserved portion	$78,000.00
Restricted non-preserved portion	$0.00
Unrestricted non-preserved portion	$5,000.00
Total	**$17,000.00**

Any amount that is preserved or restricted non-preserved is not available until a condition of release has been met. For more information, please refer to the Product Disclosure Statement (PDS) available at eisuper.com.au/pds.

We're here to help

For information about how to read your statement please see our interactive guide available at eisuper.com.au/memberstatements.

If you have any questions, you can call us on 1300 369 901, Monday to Friday from 8am to 8pm (AEST).

Your contribution caps

	Concessional contributions	Non-concessional contributions
Total contributions reported to the ATO as at 30 June 2019	$25,000.00	$0.00
Your contribution cap for the financial year ended 30 June 2019	$25,000.00	$100,000.00

An annual cap applies to the amount of concessional contributions made to superannuation that are taxed at the concessional rate of 15%. Caps also apply to non-concessional contributions. For more information, please refer to the PDS available at eisuper.com.au/pds.

If you have advised us that you intend to claim a tax deduction for all or part of your non-concessional contributions, these contributions will still appear as non-concessional contributions in the table above. The Australian Taxation Office (ATO) will record these contributions as concessional contributions based on when you submit your tax return.

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Licence 441577, trading as EISS Super, as Trustee for Energy Industries Superannuation Scheme Pool A ABN 22 277 243 559, RSE R1004861.

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LIVEWORKSHEETS