



Requesting a client's super information

You can now request information to support your clients in understanding their superannuation balance position and make appropriate contribution decisions.

- Total superannuation balance

You can request your client's total superannuation balance so you can support them in understanding their contributions cap. To calculate this amount we use data obtained from super fund reporting. Due to lodgment schedules and depending on when you request this information, it may not be up-to-date.

- Transitional non-concessional bring forward

If your clients have triggered the bring-forward period in 2015–16 or 2016–17 but not fully used their bring-forward amount before 1 July 2017, transitional arrangements will apply. We can provide current bring-forward arrangement and remaining cap balance information which will reflect the reduced annual contribution caps.

How to request your client's super information

- Send a message via Portal mail using the mail topic 'NCC Balance'.
- Request the total super balance and bring-forward information for:
 - all linked clients, or
 - specific clients, providing the relevant tax file numbers (TFNs). You should include a spreadsheet of TFNs for requests with more than 10 clients.

All requests will be actioned within 28 days.

See also:

- [Super changes \(/Individuals/Super/Super-changes/\)](#)

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Our commitment to you

We are committed to providing you with accurate, consistent and clear information to help you understand your rights and entitlements and meet your obligations.

If you follow our information and it turns out to be incorrect, or it is misleading and you make a mistake as a result, we will take that into account when determining what action, if any, we should take.

Some of the information on this website applies to a specific financial year. This is clearly marked. Make sure you have the information for the right year before making decisions based on that information.

If you feel that our information does not fully cover your circumstances, or you are unsure how it applies to you, contact us or seek professional advice.

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