

OneCare Super Internal Rollover Authority

February 2020

OnePath Life Limited (OnePath Life)

ABN 33 009 657 176 AFSL 238341

OnePath Custodians Pty Limited (OnePath Custodians)

ABN 12 008 508 496 AFSL 238346 RSE L0000673

Retirement Portfolio Service (the Fund)

ABN 61 808 189 263 RSE R1000986

347 Kent Street, Sydney NSW 2000

Customer Services

Phone 133 667

Email customer.risk@onepath.com.au

Website onepath.com.au

This Internal Rollover Authority allows you to pay your OneCare Super policy premiums from an eligible OnePath superannuation product held in the Retirement Portfolio Service (the Fund). To use this Authority:

- the member of the Fund (the 'Member') must have or be applying for **OneAnswer Frontier Personal Super; OneAnswer Personal Super; ANZ OneAnswer Personal Super**, or have an **OptiMix Superannuation account**
- the Member must be the same as the account holder of the relevant OnePath superannuation product.

Only one Internal Rollover Authority can apply for each OnePath superannuation account. Choosing to pay premiums by internal rollover may also have implications for tax payable on benefits at time of claim. Please contact your financial adviser or taxation adviser for additional guidance prior to rolling over.

OneCare Super premiums will be deducted proportionately from all your investment options (except Term Deposit options) unless you have requested to have premiums deducted from a single investment option in the OneAnswer application form or Change of Details form.

Member details

Title Mr Mrs Ms Miss Dr Other

First name(s)

Surname Date of birth (dd/mm/yyyy) / /

Residential address

Suburb/town State Postcode

OneCare Super Policy details

Policy number Product name

Institution Fund name

Fund details

Member number Product name

Institution Fund name

Transfer Authorisation

I authorise OnePath Life Limited ABN 33 009 657 176 AFSL 238341 to arrange for my OneCare Super premium payments to be deducted from and if applicable refunded to my nominated OnePath account. These amounts may include current and ongoing premium payments, and any adjustments that may occur from time to time.

The Fund is a regulated and complying superannuation fund under the *Superannuation Industry (Supervision) Act 1993*.

I authorise OnePath Custodians as trustee of the Fund to provide all relevant information and any other documentation to OnePath Life for the purposes of administering my OneCare Super policy.

I understand that I may cancel this Rollover Authority at any time by providing written notice to OnePath Life. To prevent additional rollovers, such notice should be received by OnePath Life at least 14 days before the next rollover is due.

I understand OnePath Custodians as trustee of the Fund may cancel a rollover request if I am no longer eligible to maintain some or all of my OneCare cover.

Please note that the declarations continue on the next page.

Privacy Policy

I consent to the collection, use, storage and disclosure of my/our personal information (including health and other sensitive information) as described in the Privacy Policies. OnePath Life's Privacy Policy is available at onepath.com.au/insurance/privacy-policy and OnePath Custodians' Privacy Policy is available at onepath.com.au/superandinvestments/privacy-policy

If I have provided information (including health and other sensitive information) about another person in this application (for example a beneficiary or life insured), I declare that I have the consent of that person to do so. I understand that OnePath Life and OnePath Custodians require me to inform the person concerned that I have done so and direct them to the Privacy Policies.

I/We acknowledge that OnePath Life is a company within the Zurich Financial Services Australia Group. OnePath Custodians is a company within the IOOF Group of companies, comprising IOOF Holdings Limited ABN 49 100 103 722 and its related bodies corporate (IOOF Group). OnePath Life and OnePath Custodians are not related bodies corporate.

Name of Member

Signature

Date (dd/mm/yyyy)

Head office

Office located at
347 Kent Street
Sydney NSW 2000

State offices

New South Wales
GPO Box 483
Sydney NSW 2001

Western Australia
PO Box 7737
Cloisters Square
Perth WA 6850

Queensland
GPO Box 1452
Brisbane QLD 4001

South Australia
GPO Box 1071
Adelaide SA 5001

Victoria
GPO Box 1903
Melbourne VIC 8060

Postal address

OnePath Life
GPO Box 4148
Sydney NSW 2001