

Switch Request Form

Investment Savings Bond

20 February 2017

OnePath Life Limited (OnePath Life)

ABN 33 009 657 176 AFSL 238241

242 Pitt Street, Sydney NSW 2000

Customer Services

Phone 133 665

Email customer@onepath.com.au

Website onepath.com.au

Instructions

- This form should be completed if you wish to make a switch request.
- Please complete this form in CAPITAL LETTERS using black or blue pen and either fax to 02 9234 6668 or forward to: Investment Savings Bond, OnePath Life Limited, GPO Box 5306, Sydney NSW 2001

1. Policy number

2. Policy owner details

Policy owner 1

Title Mr Mrs Ms Miss Dr Other

Surname

Given name(s)

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

Residential address (this cannot be a PO Box)
 Suburb/Town State Postcode

Country

Postal address (if different from above)
 Suburb/Town State Postcode

Country

Phone Home Business
 Mobile Fax

Email

If company, ABN - - -

Policy owner 2

Title Mr Mrs Ms Miss Dr Other

Surname

Given name(s)

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

Residential address (this cannot be a PO Box)
 Suburb/Town State Postcode

Country

Postal address (if different from above)
 Suburb/Town State Postcode

Country

Phone Home Business
 Mobile Fax
 Email
 If company, ABN - - - -

3. Switch request details

Full switch Partial switch

The minimum switch is \$250 per investment fund or the value of the applicable policy account, whichever is less.

If a partial switch is nominated, please indicate the total amount being switched \$

Step 1 – nominate where funds are being switched from

Investment fund	Switch from – amount or percentage*	
OnePath Australian Shares (AEOA, AEOH)	\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
OnePath Balanced (PEOA, PEOH)	\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
OnePath Capital Guaranteed (CGOA)	\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
OnePath Capital Stable (CSOA, CSOH)#	\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
OnePath Diversified Fixed Interest (TE01, TN01)	\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
OnePath Emerging Companies (ECOA, ECOH)	\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
OnePath Geared Australian Shares Index (TE09, TN09)	\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
OnePath International Shares (ISOA, ISOH)	\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
OnePath Managed Growth (DIOA, DIOH)	\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
OnePath Money Market (MMOA, MMOH)	\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
OnePath Sustainable Investments – Australian Shares (TE12, TN12)	\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
OnePath Tax Effective Income (TE02, TN02)	\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
OptiMix Australian Shares (TE04, TN04)	\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
OptiMix Balanced (TE05, TN05)	\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
OptiMix Global Emerging Markets Shares (TE10, TN10)	\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
OptiMix Global Shares (TE06, TN06)	\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
OptiMix Growth (TE07, TN07)	\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
OptiMix Moderate (TE08, TN08)	\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
OptiMix Property Securities (TE03, TN03)	\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %

Step 2 – Nominate where funds are being switched to

Investment fund	Switch to – amount or percentage*	
OnePath Australian Shares (AEOA, AEOH)	\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
OnePath Balanced (PEOA, PEOH)	\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
OnePath Capital Stable (CSOA, CSOH)#	\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
OnePath Diversified Fixed Interest (TE01, TN01)	\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
OnePath Emerging Companies (ECOA, ECOH)	\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
OnePath Geared Australian Shares Index (TE09, TN09)	\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
OnePath International Shares (ISOA, ISOH)	\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
OnePath Managed Growth (DIOA, DIOH)	\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
OnePath Money Market (MMOA, MMOH)	\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %

Investment fund

Switch to – amount or percentage*

OnePath Sustainable Investments – Australian Shares (TE12, TN12)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or	<input type="text"/> <input type="text"/> <input type="text"/> %
OnePath Tax Effective Income (TE02, TN02)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or	<input type="text"/> <input type="text"/> <input type="text"/> %
OptiMix Australian Shares (TE04, TN04)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or	<input type="text"/> <input type="text"/> <input type="text"/> %
OptiMix Balanced (TE05, TN05)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or	<input type="text"/> <input type="text"/> <input type="text"/> %
OptiMix Global Emerging Markets Shares (TE10, TN10)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or	<input type="text"/> <input type="text"/> <input type="text"/> %
OptiMix Global Shares (TE06, TN06)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or	<input type="text"/> <input type="text"/> <input type="text"/> %
OptiMix Growth (TE07, TN07)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or	<input type="text"/> <input type="text"/> <input type="text"/> %
OptiMix Moderate (TE08, TN08)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or	<input type="text"/> <input type="text"/> <input type="text"/> %
OptiMix Property Securities (TE03, TN03)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>	or	<input type="text"/> <input type="text"/> <input type="text"/> %

* Please use the percentage option when switching an entire balance from an investment fund. If the percentage option is selected, the amount written should represent the percentage of monies that you wish to switch. For example, if you have monies invested in two investment funds and you wish to switch all monies from one fund to the other, you would write 100% in the column of the fund that you are switching from, and 100% in the column that you are switching to.

The OnePath Capital Stable Fund is closed to investors who joined the product from 1 September 2011..

4. Future investments

Completing this section will ensure that all future investments are directed to the correct investment funds.

Investment fund

Future investment allocation

OnePath Australian Shares (AEOA, AEOH)	<input type="text"/> <input type="text"/> <input type="text"/> %
OnePath Balanced (PEOA, PEOH)	<input type="text"/> <input type="text"/> <input type="text"/> %
OnePath Capital Stable (CSOA, CSOH) [#]	<input type="text"/> <input type="text"/> <input type="text"/> %
OnePath Diversified Fixed Interest (TE01, TN01)	<input type="text"/> <input type="text"/> <input type="text"/> %
OnePath Emerging Companies (ECOA, ECOH)	<input type="text"/> <input type="text"/> <input type="text"/> %
OnePath Geared Australian Shares Index (TE09, TN09)	<input type="text"/> <input type="text"/> <input type="text"/> %
OnePath International Shares (ISOA, ISOH)	<input type="text"/> <input type="text"/> <input type="text"/> %
OnePath Managed Growth (DIOA, DIOH)	<input type="text"/> <input type="text"/> <input type="text"/> %
OnePath Money Market (MMOA, MMOH)	<input type="text"/> <input type="text"/> <input type="text"/> %
OnePath Sustainable Investments – Australian Shares (TE12, TN12)	<input type="text"/> <input type="text"/> <input type="text"/> %
OnePath Tax Effective Income (TE02, TN02)	<input type="text"/> <input type="text"/> <input type="text"/> %
OptiMix Australian Shares (TE04, TN04)	<input type="text"/> <input type="text"/> <input type="text"/> %
OptiMix Balanced (TE05, TN05)	<input type="text"/> <input type="text"/> <input type="text"/> %
OptiMix Global Emerging Markets Shares (TE10, TN10)	<input type="text"/> <input type="text"/> <input type="text"/> %
OptiMix Global Shares (TE06, TN06)	<input type="text"/> <input type="text"/> <input type="text"/> %
OptiMix Growth (TE07, TN07)	<input type="text"/> <input type="text"/> <input type="text"/> %
OptiMix Moderate (TE08, TN08)	<input type="text"/> <input type="text"/> <input type="text"/> %
OptiMix Property Securities (TE03, TN03)	<input type="text"/> <input type="text"/> <input type="text"/> %
Total	<input type="text"/> 1 <input type="text"/> 0 <input type="text"/> 0 %

Please note: The terms and conditions for any new investment fund(s) that you choose may be different to your previous investment fund(s). The Investment Savings Bond Product Disclosure Statement and Incorporated Material (dated 15 November 2010) provides details of the current terms and conditions. If no investment fund(s) is/are nominated, monies will be placed in accordance with the instructions contained in your original Application Form or any subsequent amendments.

Transaction cost factors may apply when calculating 'buy' (issue) and 'sell' (redemption) unit prices. Please refer to the PDS for further information.

The OnePath Capital Stable Fund is closed to investors who joined the product from 1 September 2011.

5. Declaration

By completing this form, I/we:

- acknowledge that I/we have fully read the current Product Disclosure Statement, Incorporated Material and Policy Document (Documents), as well as this form, and the information completed on this form is true and correct
- request OnePath Life and/or its related entities (the Group) to act upon and give effect to the directions given by me/us on this form
- agree to be bound by the terms of Documents and my/our Policy, including the Policy Schedule
- acknowledge that the Group does not make any specific recommendations concerning investment in any of the investment funds and I/we agree to not hold the Group responsible for the performance of the investment fund(s) selected
- consent to the collection, use, storage and disclosure of my/our personal information as described in OnePath's Privacy Policy which is available at onepath.com.au, or can be obtained by calling Customer Services
- acknowledge that I/we am/are not aware and have no reason to suspect that my/our investment is derived from, related to or used to fund money laundering, terrorism financing or other similar activities and my/our instructions in relation to my/our investment will not result in ANZ or any of its related group companies breaching any related laws or regulations in Australia or any other country
- acknowledge that an investment in the Investment Savings Bond is not a deposit or liability of ANZ or its related group companies, and none of them stands behind or guarantees the issuer or the capital or performance of an investment in the Investment Savings Bond, and that my/our investment is subject to investment risk, including possible repayment delays and loss of income and principal invested
- acknowledge that the Group is not liable for any loss suffered (including consequential loss) where transactions are delayed, blocked or frozen or where the Group refuses to process a transaction.

Signature of Policy owner 1

(sign clearly within box)

Date (dd/mm/yyyy)

Signature of Policy owner 2

(sign clearly within box)

Date (dd/mm/yyyy)

If this form is signed by an attorney, the attorney acknowledges that there has been no notice of revocation of the Power of Attorney at the time of signing. A certified copy of the Power of Attorney is required.

In the case of company signatories, two directors or a director and company secretary must sign, unless you are a sole director and sole company secretary.

For partnerships, please ensure all parties sign.

