

Tele Interview and Online Questionnaire

Personal Statement Applicant Guide

What do I need to do to prepare for the questions?

You need to have read and understood the Duty of Disclosure, Privacy Statement and Declarations documents that were provided to you prior to the interview. These documents detail your disclosure obligations, what information is collected and how it is handled once received.

What information do I need to have ready?

To save time on your interview, please have the following information ready:

- Your current height and weight.
- Details of past and current medical conditions including date(s) suffered and treatment(s). (Note: Colds and flu from which you have made a full recovery can be ignored.)
- Doctor's details (including name, address and phone number).
- Details of any overseas travel plans (including when, where and for how long).
- Details of any hazardous recreational activities of pastimes you partake in, such as motor or water sports.
- Reason for and results of your last doctor's consultation.
- Details of any hereditary medical conditions suffered by members of your immediate family (i.e. parents and siblings).

Due to the sensitive nature of the questions asked, please ensure that you are in a place where you are comfortable answering these questions.

How will I complete the questions?

For the Tele Interview, a OnePath booking officer will contact you to book an appropriate time for the interview (if this has not already been organised together with your financial adviser).

If you wish to change the time of your Tele Interview, please call us on 1800 751 983, weekdays, 8.00am to 6.00pm (Sydney time).

At the arranged time, an experienced Tele Interviewer will then contact you to complete your application.

For the Online Questionnaire, you will receive an email with a personalised URL which you can use to complete your application. If you wish, you have the ability to change completion methods at any time.

How long should it take?

Where applicable, questions have been written following plain English principles, in an effort to make them easier for you to interpret and complete. Depending on the answers you provide, the Tele Interview should take between 30–35 minutes, and the Online Questionnaire between 20–25 minutes.

What happens when the questions are complete?

Your adviser should contact you to notify you of the status of your application.

A Personal Statement Pack will be mailed to you within seven days of the completed Tele Interview or Online Questionnaire. This pack will include a copy of the Personal Statement with your answers and an adjustment form for you to complete and return if any of your answers were captured incorrectly or you wish to provide any additional information.

When will my Interim Cover commence?

Interim cover will commence once the application is submitted to OnePath, and the application includes either a cheque, a valid Direct Debit Authority, Credit Card Authorisation or Internal Transfer Authority for the payment of the first premium. Interim Cover will cease if any of the events set out in the 'Duration of Interim Cover' in the 'Interim Cover' section of the PDS occur. Interim Cover will also cease if the Personal Statement is not completed and submitted to OnePath within 28 days.

When will my policy start?

Your adviser will be in touch to advise you of the outcome of the application and the policy start date. The date will also be listed on your Policy Schedule, which you will receive in your Welcome Pack.

What if I am unavailable to complete the Tele Interview or Online Questionnaire?

For the Tele Interview, we will call you at the scheduled interview time and, if you are unavailable, we will leave a message. We will call you again 10 minutes later. If we can't contact you a second time, we will send you an email requesting that you contact us, or your financial adviser, to arrange another time that is suitable.

After three unsuccessful Tele Interview bookings we will cancel the Tele Interview and the application.

If the Tele Interview or Online Questionnaire is not completed within twenty one days of the request, then the request will be cancelled.

If you wish, you have the ability to change completion methods at any time.

Your Privacy

The Tele Interview call will be recorded and maintained for quality, disclosure and security purposes.

All information collected via your Tele Interview or Online Questionnaire is treated as confidential and will be handled in line with OnePath Privacy policies.

Want to know more?

If you have any questions on the Tele Interview or Online Questionnaire, please speak to your financial adviser. Otherwise, contact OnePath on 133 667, weekdays, 8.30am to 6.00pm (Sydney time).