

Tax File Number Notification Form

April 2022

OnePath Life Limited (OnePath Life)

ABN 33 009 657 176 AFSL 238341

Retirement Portfolio Service

ABN 61 808 189 263 RSE R1000986

OnePath Custodians Pty Limited (OnePath Custodians)

ABN 12 008 508 496 AFSL 238346 RSE L0000673

Customer Services

Phone 133 667

Email client.onepath@zurich.com.au

Website onepath.com.au

Instructions – Complete and return this form by fax or post:

Product	Postal address
OneCare Super	OnePath Life, Policy Admin (Tax) – OneCare Locked Bag 994, North Sydney NSW 2059
World of Protection	OnePath Life – World of Protection Locked Bag 994, North Sydney NSW 2059

Please complete all details below

Product (please select): OneCare Super
 World of Protection

Member/policy no.1

Member/policy no.2

Surname

First name(s)

Date of birth (dd/mm/yyyy) / / Tax File Number (TFN) - -

* Complete details if you have more than one product.

Providing your Tax File Number (TFN)

You or your employer may already have provided your Tax File Number (TFN) to the Fund, if not, we are required to tell you the following details before you provide your TFN.

Your TFN is confidential, and you should know the following before you decide to provide it to the Trustee or a third party engaged by either the Trustee or a related party of the Trustee to provide superannuation administration services (“third party administrator”) relating to this product:

- The Trustee and the third party administrator are authorised to collect your TFN under the Taxation and Superannuation Laws.
- If you do provide your TFN to the Trustee or the third party administrator, they will only use it for legal purposes. This includes finding or identifying your superannuation benefits where other information is insufficient, calculating tax on any superannuation benefit payments you may be entitled to.
- If you do provide your TFN to the Trustee or the third party administrator, they may provide it to the trustee of another superannuation fund or a Retirement Savings Account (RSA) provider where the trustee or RSA provider is to receive your transferred benefits in the future.
- The Trustee and the third party administrator will not pass your TFN to any other superannuation fund if you tell the Trustee or the third party administrator in writing that you do not want them to pass it on.
- The Trustee or the third party administrator may quote your TFN to the Australian Taxation Office (ATO) when reporting details of contributions for the purpose of lost member reporting, monitoring contributions caps and administration of the government co-contribution and low income superannuation contribution.

Otherwise your TFN will be treated as confidential. You are not required to provide your TFN. Declining to quote your TFN is not an offence.

However, if you do not give the Trustee or the third party administrator, your TFN, either now or later:

- They may not be able to accept personal contributions.
- Additional taxes will apply to concessional contributions (including compulsory employer contributions).
- You may pay more tax on your superannuation benefits when you withdraw them than you have to (you may get this back at the end of the financial year in your income tax assessment).
- It may be difficult to locate or amalgamate your superannuation benefits in the future.

The purposes for which the Trustee or the third party administrator can use your TFN and the consequences of not providing it to them may change in the future as a result of changes to the law.

Privacy Policy

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

If I/we have provided information about another person in this application (for example a beneficiary or life insured), I/we declare that I/we have the consent of that person to do so. I/We understand that OnePath Custodians and OnePath Life require me to inform the person concerned that I/we have done so and direct them to the relevant Privacy Policies so they may understand the manner in which their personal information (including health and other sensitive information) may be used and disclosed by OnePath Custodians and OnePath Life.

I/We acknowledge that OnePath Life is no longer a related body corporate of OnePath Custodians.

Member signature
(sign clearly within the box)

X

Date (dd/mm/yyyy)

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