

OneCare Super Internal Rollover Authority

August 2022

Zurich Australia Limited (Zurich, OnePath)

ABN 92 000 010 195 AFSL 232510

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

Customer Care

Phone 133 667

Email client.onepath@zurich.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 Zurich Australia Limited (Zurich, OnePath) ABN 92 000 010 195 AFSL 232510 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 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. To prevent additional rollovers, such notice should be received by OnePath 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 personal information as described in the Privacy Policies and the Privacy Statement(s) contained in the PDS (including discussing any information obtained from me and any doctors or accountants with the financial adviser associated with this application). OnePath's Privacy Policy is available at onepath.com.au/about-us/privacy-policy and OnePath Custodians' Privacy Policy is available at onepathsuperinvest.com.au/about-us/privacy-policy

If I have provided personal information about any identified person, I declare that I have their permission to do so and I have informed them of the Privacy Policies and the Privacy Statement(s).

I/We acknowledge that OnePath and OnePath Custodians are not related bodies corporate.

Name of Member

Signature

Date (dd/mm/yyyy)

Postal address

OnePath
Locked Bag 994
North Sydney NSW 2059