

Nomination of beneficiaries

November 2021

OnePath Life Limited (OnePath Life)

ABN 33 009 657 176 AFSL 238341

OnePath Custodians Pty Limited (Trustee)

ABN 12 008 508 496 AFSL 238346 RSE L0000673

Retirement Portfolio Service (the Fund)

ABN 61 808 189 263 RSE R1000986

Customer Services

Phone 133 667

Email client.onepath@zurich.com.au

Website onepathinsurance.com.au

This form should be completed to nominate who will be paid in the event of your death. For information on nominating a beneficiary on your policy, please refer to 'Death Benefit' in your Product Disclosure Statement (PDS).

This form is for existing members to nominate, revoke, or reconfirm a beneficiary nomination:

Please complete this form in capital letters using black or blue pen.

You can make nominations for multiple memberships held under your name using this form. Simply provide the additional member number in the Member details section below.

Non-binding nomination

To make a Non-Binding nomination you must sign section 4a. No witnesses' signatures are required in section 4b.

Binding nomination

To make a Binding nomination, or revoke your existing nomination, you and two witnesses must sign section 4a and 4b respectively.

All Nominations

Any alterations to your form must be initialled by you and both witnesses (if applicable).

In completing the proportions of benefits, your nominations must add up to 100% (no fractions or decimals). If the proportions do not equal 100%, you will be asked to complete a new form.

Please complete this form and send it to:

- **OnePath Life, Locked Bag 994, North Sydney NSW 2059; or**
- **Email:** client.onepath@zurich.com.au

1. Member details

Member number

Additional member number (if any)

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

Phone (during business hours)

Email

2. Nomination instruction

You must **select one (x)** of the following:

New nomination – making a new nomination will replace any existing **binding** or **non-binding** nominations.

I would like to make a new **binding** nomination. You and two witnesses must complete sections 3, 4a and 4b respectively.

I would like to make a new **non-binding** nomination. You must complete sections 3 and 4a.

or

Reconfirm

I would like to reconfirm my existing **binding** nomination. Complete section 4a where the nomination is yet to expire.

Section 4b will be required where the **binding** nomination has expired.

or

Revoke

I would like to revoke my existing **binding** nomination without replacing it. You and two witnesses must complete sections 4a and 4b respectively.

I would like to revoke my existing **non-binding** nomination without replacing it. Complete section 4a only.

3. Beneficiary details

You can only nominate your legal personal representative (your estate), and/or a person(s) who is a dependant, to receive your death benefit. Please refer to the PDS for more information. Your existing beneficiary nomination (if any) will be revoked and replaced by the new beneficiary nomination details you provide here.

Full name of nominated beneficiary	Relationship to member (pick one)	Date of birth (dd/mm/yyyy)	Proportion of death benefit to be paid	Preference how the amount insured is to be paid*	
				Lump sum	Income stream
1. My Legal Personal Representative (My Estate)	Not applicable	Not applicable	<input type="text"/> <input type="text"/> <input type="text"/> %	Lump sum only	
and/or nominated beneficiary(ies) below					
2. Please print in CAPITAL LETTERS	<input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Financial dependant <input type="checkbox"/> Interdependency relationship	/ /	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="checkbox"/>	<input type="checkbox"/>
3.	<input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Financial dependant <input type="checkbox"/> Interdependency relationship	/ /	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="checkbox"/>	<input type="checkbox"/>
4.	<input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Financial dependant <input type="checkbox"/> Interdependency relationship	/ /	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="checkbox"/>	<input type="checkbox"/>
5.	<input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Financial dependant <input type="checkbox"/> Interdependency relationship	/ /	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="checkbox"/>	<input type="checkbox"/>
Total			1 0 0 %	<input type="checkbox"/>	<input type="checkbox"/>

* Please note that the Trustee has the discretion as to how the amount insured is to be paid. An income stream may only be paid to a dependant. Any amount paid to an estate is paid as a lump sum.

The total of your beneficiary nominations, including your legal personal representative (your estate) must be 100% and limited to a maximum of five beneficiaries.

4a. Member Declaration

By signing this form, I confirm that:

- 1 I have read and understood the 'Death Benefit' section of the PDS issued by OnePath Custodians.
- 2 I understand that if I choose to make a **non-binding** nomination that satisfies all legal requirements, the Trustee may pay my death benefit to my nominated beneficiaries and in such proportions as I have specified.
- 3 I understand that if I choose to make a **binding** nomination:
 - if I do not confirm or amend my nomination, or make no fresh nomination within three years of the date I make the most recent valid nomination, then my nomination will lapse;
 - my benefit will not be payable in accordance with my **binding** nomination if it is cancelled or is invalid and instead, will be payable as set out in the PDS.
- 4 I understand that this nomination only applies to the relevant account(s) associated with the member numbers identified on this form.
- 5 By completing this form, I acknowledge it is my responsibility to ensure that each person I have nominated as a beneficiary is made aware that:
 - they have been nominated as a beneficiary;
 - OnePath Life and the Trustee hold a record of their personal information for this purpose;
 - they may request access to their information by calling Customer Service.
- 6 By completing the form, I consent to the collection, use, storage and disclosure of my personal information (including health and other sensitive information) as described in the Privacy Policies. OnePath Life's privacy policy is available at onepathinsurance.com.au/about-us/privacy-policy and OnePath Custodians' Privacy Policy is available at onepath.com.au/superandinvestments/privacy-policy
- 7 I consent to OnePath Life using my personal information (including health and other sensitive information) to send me information about their financial products and services from time to time. I also consent to OnePath Life disclosing my personal information (including health and other sensitive information) to their related bodies corporate and organisations with whom they have an arrangement or alliance to share information for marketing purposes. I understand this is to enable those organisations to send me information on their products or services. I also understand that if I do not want OnePath Life to use and disclose my information in this way I must phone 133 667 to withdraw my consent.
- 8 I agree that my beneficiaries and I are bound by the provisions of the relevant trust deed.
- 9 I acknowledge that from 31 May 2019, OnePath Life will no longer be a related body corporate of OnePath Custodians

Signature of member

(Sign clearly within the box)

Date (dd/mm/yyyy)

4b. Witness declaration

This section must be completed if you are making a binding nomination and/or have chosen to revoke an existing binding nomination.

Declaration: I am 18 years or over; I am not a named beneficiary on this form; and the member signed and dated this form in the presence of both of us.

Full name of witness 1

(Print in capital letters)

Signature of witness 1

(Sign clearly within the box)

Date (dd/mm/yyyy)

The date of the member and witness signatures must be the same.

Full name of witness 2

(Print in capital letters)

Signature of witness 2

(Sign clearly within the box)

Date (dd/mm/yyyy)

The date of the member and witness signatures must be the same.