

# Change of Adviser Request

April 2022

## OnePath Life Limited (OnePath Life)

ABN 33 009 657 176 AFSL 238341

## OnePath Custodians Pty Limited (OnePath Custodians)

ABN 12 008 508 496 AFSL 238346 RSE L0000673

### Customer Service

Phone 133 667

Email [client.onepath@zurich.com.au](mailto:client.onepath@zurich.com.au)

Address: Locked Bag 994

North Sydney NSW 2059

Website: [onepath.com.au](http://onepath.com.au)

Pages 1 and 2 of this form are to be completed to change the servicing financial adviser.

Please submit this form via email to [client.onepath@zurich.com.au](mailto:client.onepath@zurich.com.au) or via post to the above mentioned postal address.

Policy number:

Policy number:

Policy number:

Policy number:

## 1. Client details

### Policy Owner 1

Title

 Mr  Mrs  Ms  Miss  Dr  Other 

Surname

Given name(s)

(including middle name)

Date of birth (dd/mm/yyyy)

### Policy Owner 2

Title

 Mr  Mrs  Ms  Miss  Dr  Other 

Surname

Given name(s)

(including middle name)

Date of birth (dd/mm/yyyy)

## 2. Financial adviser details

Dealer Code

Adviser code

Dealer Group Name

Name of financial adviser

Phone

Business

Mobile

Email

### 3. Declaration and signature (for client)

By completing and signing this form, I/we:

- Confirm that I/we are no longer receiving advice from our existing financial adviser in relation to the policies/accounts listed above.
- For the policies/accounts listed above, my/our new financial adviser will be responsible for advising me/us and will have access to my/our information, which may include health information. If I/we have provided information about another person to (e.g. a life insured/beneficiary), I/we declare that I/we have the consent from that person to do so and have informed them that their information may be visible to the financial adviser named in this form and any other person authorised by the financial adviser.
- Acknowledge that OnePath Custodians/OnePath Life may refuse to accept this authority.
- Agree to release/discharge and indemnify OnePath Custodians/OnePath Life from any liability, cost or loss that is incurred as a result of acting on this authority.
- Authorise all remuneration currently being paid for the policies/accounts listed be paid to the financial adviser nominated in Section 2.
- Declare that I/we have read this form and declare that the information provided is true and accurate.
- Acknowledge that OnePath Life is a company within the Zurich Financial Services Australia Group. OnePath Custodians is part of the Insignia Financial group of companies, comprising Insignia Financial Ltd (formerly IOOF Holdings Ltd) (ABN 49 100 103 722) and its related bodies corporate (Insignia Financial Group). OnePath Life and OnePath Custodians are not related bodies corporate.

Signature of Policy Owner 1

Date (dd/mm/yyyy)

Signature of Policy Owner 2

Date (dd/mm/yyyy)