

OneCare Super Employment Declaration

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

Retirement Portfolio Service (Fund)

ABN 61 808 189 263, RSE R1000986

Customer Services

Phone 133 667

Email client.onepath@zurich.com.au

Website onepath.com.au

Member details

Policy number

Surname

First name(s)

Contributions made to the Retirement Portfolio Service by you, or on your behalf, are used to pay the premiums for this policy. On or after age 67, and until age 75, contributions to superannuation can only be made if:

- You meet the 'work test' (i.e. you are 'gainfully employed' for at least 40 hours in any consecutive 30 day period) during the financial year in which the contribution is made; or
- You meet the 'work test exemption' (i.e. you do not meet the 'work test' for this financial year, but met the 'work test' for the previous financial year, and you had a **total** superannuation balance below \$300,000 on 30 June of the previous financial year, and you have not already relied on the 'work test exemption' for a previous financial year); or
- The contributions are mandated employer contributions (e.g. superannuation guarantee or award).

OnePath Custodians (the Trustee) cannot take prospective employment into account. You must meet the 'work test' or 'work test exemption' during the financial year before the Trustee can accept the contribution.

Please tick **one** of the boxes below to confirm your eligibility to contribute to superannuation (i.e. pay the premiums under this policy).

If you are no longer eligible to contribute to superannuation, but would like to continue your insurance cover with us, you can apply for a non-superannuation policy or alter your payment method. **Please discuss your options with your adviser.**

I confirm:

- I have met the 'work test' in this financial year.
- I have not met the 'work test' in this financial year but met the 'work test' last financial year, and would like to exercise the 'work test exemption'.
- I have not met the 'work test' this financial year, and I am not eligible for the 'work test exemption'. I would like to (please tick one of the boxes below):
- change my payment method to Internal Rollover. Enclosed is a completed OneCare Super Internal Rollover Authority Form.
 - change my payment method to External Rollover. Enclosed is a completed Enduring Rollover Request Form.
 - continue my cover outside of superannuation and will discuss this option with my financial adviser.
- The contributions are mandated employer contributions.

Please note: 'Gainfully employed' means employed or self-employed for 'gain or reward' in any business, trade, profession, vocation, calling, occupation or employment.

Privacy Policy

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 onepath.com.au/about-us/privacy-policy and OnePath Custodians' Privacy Policy is available at onepath.com.au/superandinvestments/privacy-policy

If I have provided information (including health and other sensitive information) about another person in this application (for example a beneficiary or life insured), I declare that I have the consent of that person to do so. I understand that OnePath Life and OnePath Custodians requires me to inform the person concerned that I have done so and direct them to the Privacy Policies.

I/We acknowledge that OnePath Life is a company within the Zurich Financial Services Australia Group. OnePath Custodians is a company within the IOOF Group of companies, comprising IOOF Holdings Limited ABN 49 100 103 722 and its related bodies corporate (IOOF Group). OnePath Life and OnePath Custodians are not related bodies corporate.

Signature

X

Date (dd/mm/yyyy)

/ /

Postal address

OnePath Life
Locked Bag 994
North Sydney NSW 2059