

# Enduring Rollover Request Form

OneCare Super

October 2024

**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 (Fund)**

ABN 61 808 189 263 RSE R1000986 SFN 4571 159 75

**Customer Care**

**Phone** 133 667

**Email** client.onepath@zurich.com.au

**Website** onepath.com.au

## Important Information

You may be requested by your existing super fund to forward details or sign additional documents. Please action this as soon as possible. Please be aware that other financial institutions may impose a fee when you withdraw from their super fund. There may also be delays in having your money transferred from your existing super fund.

If you intend to lodge a notification that you will be claiming a tax deduction for the superannuation product from which you are transferring, you may need to do so before you transfer to OneCare Super. Choosing to pay premiums by 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.

OnePath will rely on this authority to request the exact rollover amount required to fund the insurance premium for your policy at policy commencement and at each policy renewal date. We will notify you of the amount of annual premium required prior to requesting the rollover from the nominated super fund.

## 1. Applicant details

Title	Mr <input type="checkbox"/>	Mrs <input type="checkbox"/>	Ms <input type="checkbox"/>	Miss <input type="checkbox"/>	Dr <input type="checkbox"/>	Other <input type="text"/>
Surname	<input type="text"/>					
Given name(s)	<input type="text"/>					
Date of birth (dd/mm/yyyy)	<input type="text"/>					
Residential address (this cannot be a PO Box)	<input type="text"/>					
Suburb/Town	<input type="text"/>				State <input type="text"/>	Postcode <input type="text"/>
Country	<input type="text"/>			Contact phone	<input type="text"/>	

## 2. Request for partial rollover of funds: From – Fund details (paying institution)

Institution	<input type="text"/>					
Fund name	<input type="text"/>					
Unique Superannuation Identifier (USI)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Member/Policy number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Address of paying institution	<input type="text"/>					
Suburb/Town	<input type="text"/>				State <input type="text"/>	Postcode <input type="text"/>

## 3. Request for partial rollover of funds: To – Fund details (receiving institution)

Institution	<b>ZURICH AUSTRALIA LIMITED</b>					
Fund name	<b>RETIREMENT PORTFOLIO SERVICE</b>					
Policy Number	<input type="text"/>					
Unique Superannuation Identifier (USI)	<b>61808189263001</b>					
Address of receiving institution	<b>LOCKED BAG 994, NORTH SYDNEY NSW 2059</b>				Phone number of receiving institution	<b>133667</b>

#### 4. Approval to transfer

- I declare I have read this form and the information completed is true and correct.
- I request and consent to the transfer of superannuation benefits as described above and authorise the superannuation provider of each fund to give effect to this transfer.
- I understand that the trustee of the fund nominated in (2) 'From-Fund details (paying institution)' is discharged from any liability in respect of the amount transferred per this form.
- I authorise OnePath to arrange for the rollover of funds as and when required, and for the amount required, to meet OneCare premium payments due for insurance held in respect of my life. These amounts may include current and ongoing premium payments, and any adjustments which may occur from time to time.
- I acknowledge this enduring authority allows for subsequent rollovers to be requested, as required, for the purpose of paying insurance premiums. The authority will remain effective until such time as I revoke it in writing.
- To the best of my knowledge, my other superannuation fund(s) is a complying superannuation fund under the *Superannuation Industry (Supervision) Act 1993* (Cth).
- The Retirement Portfolio Service (the Fund) is a regulated and complying superannuation fund under the *Superannuation Industry (Supervision) Act 1993* (Cth).
- I consent to change my premium frequency to an annual frequency (if applicable).
- I understand I may be eligible for a rollover rebate, which will reduce the amount of the rollover required to meet the premium amount due, and that the availability of the rollover rebate may be withdrawn in the future.
- I am aware I may ask my superannuation provider for information about any fees or charges that may apply, or any other information about the effect this transfer may have on my benefits, and do not require any further information.
- I approve the deduction of any applicable transfer fees, exit fees and taxes from my account with the nominated super fund in addition to the benefit being transferred (subject to legislative restrictions).
- I understand conditions apply to the transfers the Trustee can accept, and if a transfer is rejected because the conditions are not met, I will make alternative arrangements to pay the premium for OneCare Super. The conditions that apply to transfers include the following:
  - the rollover amount, plus any rollover rebate, must equal the premium due.
  - only rollovers on which any applicable fund tax has already been paid can be accepted. The rollover will be rejected if it contains, in whole or in part, an Untaxed Element of a Taxable Component.
  - rollovers which contain foreign transfer amounts (including UK transfers) or KiwiSaver amounts cannot be accepted.
- I understand that if I cancel or change my policy, any pro-rata premium refund or reimbursement will not be paid to me but will be paid into my nominated superannuation fund accumulation account unless I nominate a different fund at the time the refund is processed, and the Trustee will retain a corresponding pro-rata amount of any rollover rebate applied.
- I understand that I am transferring an amount from my superannuation accumulation account to pay OneCare Super life insurance premiums and therefore my superannuation account balance and retirement savings may be reduced.
- I understand that each superannuation fund has differing rules such as imposing a minimum rollover amount, and I am aware of all possible member entitlements that I will lose by transferring an amount from my superannuation accumulation account, such as the cancellation of any life insurance cover I have attached to that accumulation account.
- I acknowledge that my superannuation fund may have particular processing requirements that if not satisfied may prevent or delay the processing of rollovers, and it is my responsibility to ensure any requirements of which I am notified are provided.
- I understand that where I intend to claim a tax deduction for any contributions I have made to the super fund nominated in this form, it is my responsibility to lodge the required notice of intention with the fund's trustee, before any rollovers are processed, otherwise I may be prevented from claiming the deduction on the full amount of the contributions.
- I understand that I may seek advice regarding the implications of rolling over amounts from a super fund with a service period start date earlier than the start date of my OneCare Super membership for tax payable on death and disability benefits payable from OneCare Super, and do not require further information.
- 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](http://onepath.com.au/about-us/privacy-policy) and OnePath Custodians' Privacy Policy is available at [onepathsuperinvest.com.au/about-us/privacy-policy](http://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 acknowledge that Zurich and OnePath Custodians are not related bodies corporate.

Signature of member

X

Date (dd/mm/yyyy)

/ /

#### Postal address

OnePath  
Locked Bag 994  
North Sydney NSW 2059