Please do not staple

OnePath

Switch Request Form

OneAnswer Frontier Personal Super
OneAnswer Frontier Pension
OneAnswer Term Allocated Pension
OptiMix Term Allocated Pension
ANZ OneAnswer Term Allocated Pension

November 2026

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 133 665
Email client@onepathsuperinvest.com.au
Website onepathsuperinvest.com.au
ANZ OneAnswer anz.com

Did you know that it's faster and more secure completing this request online? Visit onepathsuperinvest.com.au to see all of the online transactions available.

Instructions

- When you complete this form, you must have read your Product Disclosure Statement (PDS) and any subsequent updates and Fees Guide under which you commenced this account and any subsequent updates, Investment Funds Guide, Buy-Sell Spread Guide, OneAnswer Hedge Funds Guide and Additional Information Guide, available at onepathsuperinvest.com.au for the terms and conditions.
- Please complete the form and send it to: OneAnswer, OnePath, GPO Box 5306, Sydney NSW 2001 or email* to client@onepathsuperinvest.com.au

* Emails can only be accepted from the email address held on our records.

1. Member details

Member number ☐☐☐☐☐☐☐☐☐☐☐☐☐

Title Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Dr ☐ Other ☐

Surname

Given name(s) (including middle name)

Date of birth (dd/mm/yyyy) / /

Phone (during business hours)

2. Auto-rebalance

Complete section 2 only if you want to add or amend the auto-rebalance plan. The auto-rebalance plan will exclude ANZ Term Deposits and MoneyForLife investment funds. It is not available if you are invested in suspended funds.

a. Select the interval at which you want the rebalance to occur

☐ Quarterly ☐ Half-yearly ☐ Yearly

b. Choose the minimum deviation (tolerance level) from your asset allocation to trigger an auto-rebalance ☐☐% (default tolerance level is 5%)

3. Investment details

Please tick one of the following:

☐ I would like to switch out of 100% of my current investment funds (not available if invested in ANZ Term Deposit options).
Please complete Section 3B – Switch to.

☐ I would like to perform a partial switch for some of my current investment funds.
Complete both Section 3A – Switch from and 3B – Switch to.

☐ I would like to add an Auto-Rebalance or amend my existing Auto-Rebalance plan.
Please complete Section 3B – Switch to percentage (%) only. Auto-rebalance is not available on Term Allocated Pension.

☐ I would like to update the fund(s) to which my future Superannuation contribution is allocated (existing investments remain the same).
Please complete the Future Investment Authority column in Section 3B – Switch to.

☐ I would like to update the fund(s) from which my pension is paid. Please complete the Future Pension Authority column in Section 3B - Switch to.

If you want to switch to more than 11 investment funds, please complete the request online at onepathsuperinvest.com.au

If you nominate your switch using the dollar ($) column, your fund allocations on this form may differ from the actual allocation shown on your Confirmation of Switch Request because movements in the unit price have occurred.

Generally switch requests received before 12 noon on Sydney business days will be processed using the unit price effective on the date that the request is received. However, if your request requires us to process the switch over multiple days then we will use the unit price effective on the date each part of the switch is processed. If there are current transactions pending (e.g. rebates and fees) on the day a switch is requested, the switch will be processed when all other transactions have been completed using the unit price effective on the date the switch is processed.

You cannot use this form to switch from ANZ Term Deposit options. Please use the ANZ Term Deposit Break Form.

Please clearly write the fund code (see pages 4-6) and investment fund name specific to your product in the below section(s) for each investment selected. Only complete either the $ switch column or the % switch column. If both are completed we will act on the details in the % switch column.

A. Switch from

Fund code	Investment fund name	Complete one column only Switch from amount ($)	or	Switch from percentage (%)
		$, .	or	%
		$, .	or	%
		$, .	or	%
		$, .	or	%
		$, .	or	%
		$, .	or	%
		$, .	or	%
		$, .	or	%
		$, .	or	%
		$, .	or	%
	Total	$, . 0		

B. Switch to

Fund code	Investment fund name	Complete one column only Switch to amount ($)	or	Switch to percentage (%)	Future Investment Authority/ Pension Authority
		$, .	or	%	%
		$, .	or	%	%
		$, .	or	%	%
		$, .	or	%	%
		$, .	or	%	%
		$, .	or	%	%
		$, .	or	%	%
		$, .	or	%	%
		$, .	or	%	%
		$, .	or	%	%
		$, .	or	%	%
	Total	$, . 0	or	100 %	100 %

Balancing fund

When requesting to switch in ($) value a balancing fund is required to be nominated, this accounts for any differences in nominated amounts due to market fluctuations.

Name of balancing fund

4. Insurance fee deduction – (Only Applicable to OneAnswer Frontier Super)

If you currently have insurance fees deducted from a single fund and you have fully switched out of that fund, please nominate a new single investment fund below. Otherwise, the insurance fees will be deducted proportionately across all your investment funds (except ANZ Term Deposit and MoneyForLife investment funds). Alternatively, you can choose to change the way an existing insurance fee is deducted (nominate a new single fund or across all funds proportionately).

Please provide the name of the single investment fund from which to deduct the insurance fees

Or

Please tick the box to indicate that you would like the insurance fee to be deducted proportionately across all funds.* ☐

* Excludes ANZ Term Deposit options, suspended funds and MoneyForLife funds.

5. Adviser Service Fee

If you currently have an Ongoing or Fixed Term Arrangement Adviser Service Fee (ASF) deducted from a single fund and you have fully switched out of that fund, nominate a new single investment fund below. Otherwise, the ASF will be deducted proportionately across all your investment funds. Alternatively, you can choose to change the way an existing Ongoing or Fixed Term Arrangement ASF is deducted (nominate a new single fund or across all funds proportionately).

Please provide the name of the single investment fund from which to deduct the ASF

Or

Please tick the box to indicate that you would like the ASF to be deducted proportionately across all funds.* ☐

* Excludes ANZ Term Deposit options, suspended funds and MoneyForLife funds.

Please ensure that you sign the declaration on page 4

6. Important information for applicants and signature

Important: The terms and conditions for your new investment fund(s) may be different to your previous investment. The PDS under which you commenced this account and any subsequent updates provides details of the terms and conditions for your changed investment. If you require a copy of the relevant PDS, it is available online at onepathsuperinvest.com.au or you may choose to phone Customer Services on 133 665. If you want further information, or if you want to discuss your investment funds, please contact your financial adviser or Customer Services.

OnePath Custodians is part of the Insignia Financial group of companies comprising Insignia Financial Ltd (ABN 49 100 103 722) and its related bodies corporate (Insignia Financial Group).

Only relevant to ANZ OneAnswer Term Allocated Pension: The Australia and New Zealand Banking Group Limited (ABN 11 005 357 522) (ANZ) brand is a trademark of ANZ and is used by OnePath Custodians under licence from ANZ. ANZ and the Insignia Financial Group are not related bodies corporate. ANZ does not stand behind or guarantee these products.

Read the PDS and additional information

Before submitting this request, you should read the PDS for OneAnswer Frontier Personal Super and Pension, the PDS for OneAnswer Term allocated Pension or OptiMix Term Allocated Pension under which you commenced your account and any subsequent updates. You should contact us or speak to your adviser if you do not understand something.

There is additional information about OneAnswer Frontier Super and Pension in the Fees Guide, Investment Funds Guide, Buy-Sell Spread Guide, OneAnswer Hedge Funds Guide and Additional Information Guide which you should read as it may assist you in making an investment decision. Please note information in the Fees Guide and Additional Information Guide is only applicable to OneAnswer Frontier Super and Pension.

Privacy

OnePath Custodians collects the information in this form in order to operate your superannuation account. Your personal information (including where authorised and required, your sensitive information) will be handled in accordance with the Trustee's privacy policy, which is available at onepathsuperinvest.com.au/about-us/privacy-policy. The privacy policy contains information about how you may access or correct your personal information held by the Trustee and how you may make a privacy-related complaint.

If you have provided information about another person in this application (for example a life insured), you should obtain the permission of that person to do so, inform the person concerned that you have done so and direct them to the Privacy Policy so they may understand the manner in which their information may be used and disclosed by OnePath Custodians.

Marketing

OnePath Custodians and its related group companies may use your personal information to send you information about their products or services from time to time. OnePath Custodians may also disclose your personal information to organisations who are in an alliance with OnePath Custodians to enable those alliance partners to send you information about their products and services. You can change your marketing preferences by telephoning the Trustee on 133 665.

Information you must provide to us

We will rely on the information you give us to process your request. By signing and submitting this form, you represent that the information you have provided is true and correct. If any of the information you have provided changes, including your information regarding the contribution eligibility rules as set out in the PDS, you should inform us as soon as possible.

AML/CTF

The Trustee is required to collect your personal information under the AML/CTF Laws and other subordinate instruments. We may require additional information from you for the purpose of complying with our obligations under the AML/CTF Act. To verify your identity for Know Your Customer (KYC) purposes, the Trustee may also solicit personal information about you from reliable identity verification service providers.

The Trustee may be required to pass on your personal information or information about your investment to relevant regulatory authorities in compliance with the AML/CTF Laws and can delay or decline to process a transaction and report it to relevant regulatory authorities if the Trustee is required to do so under the law.

You confirm that, to the best of your knowledge, you are not aware and have no reason to suspect that the monies contributed to the Fund, have been or will be derived from or released to any money laundering, terrorism financing or other activities deemed illegal, or that the proceeds of any withdrawals will be used to finance any illegal activities. You also acknowledge that your instructions in relation to your investment must not, to the best of the your knowledge, result in Trustee or any of its related entities breaching any related laws or regulations in Australia or any other country.

Investment risk

It is important that you understand that OnePath Custodians or its related group companies do not guarantee the repayment of capital, the performance of, or any rate of return of your investment in OneAnswer Frontier Personal Super and Pension.

Your investment is subject to investment risk, including possible repayment delays and loss of income and principal invested.

Signature of applicant

✗ **Date** (dd/mm/yyyy) / /

OneAnswer Frontier Personal Super

Investment fund	Fund Code
Multi-manager investment funds	
Investor Profile 2 – Conservative	
MultiSeries 30	SH35
OptiMix Australian Fixed Interest	SG59
Investor Profile 3 – Moderate	
MultiSeries 50	SH36
Investor Profile 4 – Growth	
MultiSeries 70	SH37
MultiSeries 90	SH38
Investor Profile 5 – High growth	
Global shares	
OptiMix Global Emerging Markets Shares	SG87
OptiMix Global Shares	SG47
Single manager investment funds	
Investor Profile 1 – Defensive	
ANZ Cash Advantage	SG11
ANZ Term Deposit – 3 months	TS13**
ANZ Term Deposit – 6 months	TS14**
ANZ Term Deposit – 12 months	TS15**
ANZ Term Deposit – 2 years	TS16**
Investor Profile 2 – Conservative	
Kapstream Absolute Return Income	SG78
OnePath Conservative Index	SG96
OnePath Diversified Bond Index	SG04
OnePath Diversified Fixed Interest	SG24
Pendal Monthly Income Plus	SG88
Perpetual Conservative Growth	SG65
Schroder Fixed Income	SH09
UBS Diversified Fixed Income	SG60
Investor Profile 3 – Moderate	
Janus Henderson Diversified Credit	SG75
OnePath Balanced Index	SG97
Schroder Real Return	SG43
T. Rowe Price Dynamic Global Bond	SH14
Investor Profile 4 – Growth	
Bentham Global Income	SG76
BlackRock Diversified ESG Growth	SG68
BlackRock Tactical Growth	SG53
OnePath Growth Index	SH01
Perpetual Balanced Growth	SG44

Investment fund	Fund Code
Single manager investment funds (cont.)	
Investor Profile 5 – High growth	
Multi-sector	
OnePath High Growth Index	SH02
Australian shares	
Ausbil Australian Emerging Leaders	SG73
BlackRock Advantage Australian Equity	SG70
Fidelity Australian Equities	SG94
First Sentier Imputation	SG54
Greencape Broadcap	SH13
Merlon Australian Share Income	SG89
OnePath Australian Shares	SG20
OnePath Australian Shares Index	SG79
OnePath Australian Shares Income*****	SG19
OnePath Emerging Companies	SG18
OnePath Geared Australian Shares Index	SG85
OnePath Select Leaders	SG21
OnePath Sustainable Investments – Australian Shares	SG39
Pendal Australian Shares	SG93
Pendal Smaller Companies	SG71
Perpetual Australian Shares	SG40
Perpetual ESG Australian Share	SG92
Schroder Australian Equity	SG62
Global shares	
Antipodes Global Value Fund*	SG37
Arrowstreet Global Equity (Hedged)	SG56
BlackRock Advantage International Equity	SG83
OnePath Global Emerging Markets Shares	SG35
OnePath Global Shares	SG17
OnePath Global Smaller Companies Shares	SG58
OnePath International Shares Index	SG31
OnePath International Shares Index (Hedged)	SG80
T. Rowe Price Global Equity	SG03
Property	
OnePath Australian Property Securities Index	SG81
OnePath Global Property Securities Index	SG38
OnePath Property Securities	SG22
Infrastructure	
ClearBridge Global Infrastructure Value Hedged ***	SG02
First Sentier Global Listed Infrastructure	SH12
OnePath Global Listed Infrastructure Index	SH34
Closed funds	
MoneyForLife Index Conservative †	SG08
MoneyForLife Index Balanced †	SG10
MoneyForLife Index Moderate †	SG09
SG Hiscock Property^	SG61
Vinva Global Alpha**** †	SG41

^ This fund is not available to members who joined after 18 September 2017.
** If a switch is made into an ANZ Term Deposit for the same term as an existing ANZ Term Deposit that is already held, then a new ANZ Term Deposit will be established. The prevailing interest rate at the time of the switch will apply.
* Previously known as Antipodes Global (Long only).
*** Previously known as ClearBridge RARE Infrastructure Value Hedged.
**** Previously known as Magellan Global
***** Previously known as OnePath Blue Chip Imputation
† Available only to investors who already have a holding in this investment option. Once you have withdrawn all your investment balance from this option, it will no longer be available to you for future investments.

OneAnswer Frontier Pension and OneAnswer Term Allocated Pension (TAP)

Investment fund	Fund code	
	EF, NEF & // Select TAP	Frontier Pension/TTR
Multi-manager investment funds		
Investor Profile 2 – Conservative		
MultiSeries 30	OPC	SM35/TM35
OptiMix Australian Fixed Interest	OPF	SL65/TL65
Investor Profile 3 – Moderate		
MultiSeries 50	OPD	SM36/TM36
Investor Profile 4 – Growth		
MultiSeries 70	OPB	SM37/TM37
MultiSeries 90	OPG	SM38/TM38
Investor Profile 5 – High growth		
Global shares		
OptiMix Global Emerging Markets Shares	N/A	SL48/TL48
OptiMix Global Shares	OPI	SL56/TL56
Single manager investment funds		
Investor Profile 1 – Defensive		
ANZ Cash Advantage	YVX	SL02/TL02
ANZ Term Deposit – 3 months	TP19, TP25	TP13
ANZ Term Deposit – 3 months (TTR)	N/A	TT13
ANZ Term Deposit – 6 months	TP20, TP26	TP14
ANZ Term Deposit – 6 months (TTR)	N/A	TT14
ANZ Term Deposit – 12 months	TP21, TP27	TP15
ANZ Term Deposit – 12 months (TTR)	N/A	TT15
ANZ Term Deposit – 2 years	TP22, TP28	TP16
ANZ Term Deposit – 2 years (TTR)	N/A	TT16
Investor Profile 2 – Conservative		
Kapstream Absolute Return Income	MLX	SL37/TL37
OnePath Conservative Index	N/A	SL94/TL94
OnePath Diversified Bond Index	N/A	SL87/TL87
OnePath Diversified Fixed Interest	APV	SL27/TL27
Pendal Monthly Income Plus	N/A	SL49/TL49
Perpetual Conservative Growth	ZGX	SL73/TL73
Schroder Fixed Income	AKX	SM07/TM07
UBS Diversified Fixed Income	ZXX	SL66/TL66
Investor Profile 3 – Moderate		
Janus Henderson Diversified Credit	CFX	SL34/TL34
OnePath Balanced Index	N/A	SL95/TL95
Schroder Real Return	ZSX	SL46/TL46
T. Rowe Price Dynamic Global Bond	APX	SM12/TM12
Investor Profile 4 – Growth		
Bentham Global Income	CSX	SL35/TL35
BlackRock Diversified ESG Growth	YBX	SL76/TL76
BlackRock Tactical Growth	ZCX	SL31/TL31
OnePath Growth Index	N/A	SL96/TL96
Perpetual Balanced Growth	ZBX	SL47/TL47

Investment fund	Fund code	
	EF, NEF & // Select TAP	Frontier Pension/TTR
Investor Profile 5 – High growth		
Multi-sector		
OnePath High Growth Index	N/A	SI97/TL97
Australian shares		
Ausbil Australian Emerging Leaders	ADX	SL30/TL30
BlackRock Advantage Australian Equity	YAX	SL77/TL77
Fidelity Australian Equities	YPX	SL83/TL83
First Sentier Imputation	ZFX	SL33/TL33
Greencape Broadcap	AOX	SM11/TM11
Merlon Australian Share Income	YMX	SL50/TL50
OnePath Australian Shares	APA	SL11/TL11
OnePath Australian Shares Index	VAX	SL39/TL39
OnePath Australian Shares Income****	APN	SL17/TL17
OnePath Emerging Companies	APE	SL15/TL15
OnePath Geared Australian Shares Index	OPJ	SL44/TL44
OnePath Select Leaders	APZ	SL12/TL12
OnePath Sustainable Investments – Australian Shares	APU	SL28/TL28
Pendal Australian Shares	YOX	SL82/TL82
Pendal Smaller Companies	YEX	SL78/TL78
Perpetual Australian Shares	ZKX	SL40/TL40
Perpetual ESG Australian Share	N/A	SL53/TL53
Schroder Australian Equity	ZOX	SL68/TL68
Global shares		
Antipodes Global Value Fund*	APJ	SL26/TL26
Arrowstreet Global Equity (Hedged)	ZAX	SL62/TL62
BlackRock Advantage International Equity	ZHX	SL71/TL71
OnePath Global Emerging Markets Shares	APK	SL25/TL25
OnePath Global Shares	API	SL09/TL09
OnePath Global Smaller Companies Shares	OPS	SL64/TL64
OnePath International Shares Index	APR	SL22/TL22
OnePath International Shares Index (Hedged)	VIX	SL41/TL41
T. Rowe Price Global Equity	N/A	SL86/TL86
Property		
OnePath Australian Property Securities Index	VPX	SL43/TL43
OnePath Global Property Securities Index	GPJ	SL04/TL04
OnePath Property Securities	APD	SL13/TL13
Infrastructure		
ClearBridge Global Infrastructure Value Hedged **	YRX	SL85/TL85
First Sentier Global Listed Infrastructure	ANX	SM10/TM10
OnePath Global Listed Infrastructure Index	N/A	SM32/TM32
Closed funds		
MoneyForLife Index Balanced†	N/A	SL93/TL93
MoneyForLife Index Conservative†	N/A	SL91/TL91
MoneyForLife Index Moderate†	N/A	SL92/TL92
SG Hiscock Property^^	ZLX	SL67/TL67
Vinva Global Alpha*** †	ZNX	SL42/TL42

N/A – Not available

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† Available only to investors who already have a holding in this investment option. Once you have withdrawn all your investment balance from this option, it will no longer be available to you for future investments.

* Previously known as Antipodes Global (Long only).

** Previously known as ClearBridge RARE Infrastructure Value Hedged.

*** Previously known as Magellan Global

**** Previously known as OnePath Blue Chip Imputation

OptiMix Term Allocated Pension

Investment fund	Fund code	
	Entry Fee	Nil Entry Fee
Geared Australian Shares Index	OPJ1	OPJ2
MultiSeries 30	OPC1	OPC2
MultiSeries 50	OPD1	OPD2
MultiSeries 70	OPB1	OPB2
MultiSeries 90	OPG1	OPG2
OptiMix Australian Fixed Interest	OPF1	OPF2
OptiMix Cash	OPA1	OPA2
OptiMix Global Share	OPI1	OPI2
OptiMix Global Smaller Companies Share	OPS1	OPS2
Closed funds		

ANZ OneAnswer Term Allocated Pension

Investment fund	Fund code
Multi-manager investment funds	
Investor Profile 2 – Conservative	
MultiSeries 30	G19
OptiMix Australian Fixed Interest	G24
Investor Profile 3 – Moderate	
MultiSeries 50	G20
Investor Profile 4 – Growth	
MultiSeries 70	G50
MultiSeries 90	G21
Investor Profile 5 – High Growth	
Global shares	
OptiMix Global Shares	G27
Single-manager investment funds	
Investor Profile 1 – Defensive	
OnePath Cash	G10
Investor Profile 2 – Conservative	
Kapstream Absolute Return Income	G64
OnePath Diversified Fixed Interest	G15
Perpetual Conservative Growth	G67
UBS Diversified Fixed Income	G31
Investor Profil 3 – Moderate	
Janus Henderson Diversified Credit	G58
Schroder Real Return	G57
Investor Profile 4 – Growth	
Bentham Global Income	G59
BlackRock Diversified ESG Growth	G56
Perpetual Balanced Growth	G66
Investor Profile 4 –High Growth	
Australian shares	
Ausbil Australian Emerging Leaders	G54
BlackRock Advantage Australian Equity	G29
First Sentier Imputation	G36
OnePath Australian Shares	G13
OnePath Australian Shares Index	G41
OnePath Australian Shares Income***	G14
OnePath Geared Australian Shares Index	G75
OnePath Select Leaders	G43
OnePath Sustainable Investments – Australian Shares	G17
Pendal Smaller Companies	G51
Perpetual Australian Shares	G35
Schroder Australian Equity	G34

Investment fund	Fund code
Single-manager investment funds (continued)	
Global shares	
Antipodes Global Value Fund*	G74
Arrowstreet Global Equity (Hedged)	G38
BlackRock Advantage International Equity	G40
OnePath Global Emerging Markets Shares	G18
OnePath Global Shares	G62
OnePath Global Smaller Companies Shares	G28
OnePath International Shares Index	G72
OnePath International Shares Index (Hedged)	G42
Property	
OnePath Australian Property Securities Index	G73
OnePath Property Securities	G12
Closed funds	**Fund code**
SG Hiscock Property^	G32
Vinva Global Alpha** †	G30

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BCE-4441 (4536) 1126