

Pension Payment Update Form

OneAnswer Frontier Pension and Term Allocated Pensions

May 2025

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

GPO Box 5306, Sydney NSW 2001

Customer Services

Phone 133 665

Email client@onepathsuperinvest.com.au

Website onepathsuperinvest.com.au



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This form is to be used to change details relating to pension payments by existing members in the following products:

- OneAnswer Frontier Pension
- OneAnswer Term Allocated Pension
- OptiMix Term Allocated Pension

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 currently held on our records.

1. Member details

Member number

Title

Surname

Given name(s)
(including middle name)

Date of birth (dd/mm/yyyy)

Phone (during business hours)

Mobile

Email

2. Change of pension payment amount and/or frequency

Please complete this section to nominate the amount and/or frequency of your annual pension (subject to maximum and minimum guidelines).

Please tick one of the following options*:

☐

Minimum annual payment.

☐

An annual amount of \$ for the period 1 July–30 June.

☐

A regular payment amount of \$.

Please nominate your regular pension payment frequency below:

☐

Monthly

☐

Quarterly

☐

Half-yearly

☐

Yearly (not available in July)

Please nominate the date each payment is to be made. If no date is nominated we will choose the 21st.

☐

7th

☐

14th

☐

21st

☐

28th

Please nominate the month and year for your new pension payment /

MoneyForLife investment funds*

If you are invested in a combination of MoneyForLife investment funds and other investment funds please select one of the following:

☐

Pay my MoneyForLife Maximum Annual Income in full.

☐

Pay up to % of my Maximum Annual Income.

Please note: If your MoneyForLife Annual Income is less than the annual pension amounts nominated above, or does not meet the minimum pension payment requirements, an additional amount will be paid from your other investment funds (if available).

* Not available for Term Allocated Pension.



3. Change of nominated financial institution account

Payments cannot be made to third-party bank accounts (you can only nominate an account which is held in your name, either solely or jointly).

I would like my pension payments to be credited to the following financial institution account:

Name of financial institution

Branch where account is held

Account holder name(s)

BSB number

-

Account number

4. Change of future pension payment authority

Please clearly write the fund code(s) and investment fund name(s) in the table below. Only include the investment fund(s) that you want your pension paid from. A listing of fund codes and investment fund names can be found on pages 4 (OneAnswer) and 5 (OptiMix).

Fund code	Investment fund name	Percentage (%)
		<div><div></div><div></div><div></div></div> %
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Total		<div><div>1</div><div>0</div><div>0</div></div> %

5. Important information and signature

Read the PDS and additional information

Before submitting this form, you should read the PDS for OneAnswer Frontier Personal Super and Pension or 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 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.

Privacy

OnePath Custodians collects the information in this form in order to process your payment instructions.

Your personal information (including where authorised and required, your sensitive information) will be handled in accordance with OnePath Custodian'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 and how you may make a privacy-related complaint.

If you have provided information about another person in this application (for example a beneficiary), you should obtain the permission of that person to do so, inform the person concerned that you have done so and direct them to OnePath Custodian's 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 us 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, you should inform us as soon as possible.

Investment risk

It is important that you understand that the Trustee or its related group companies do not guarantee the repayment of capital, the performance of, or any rate of return of an investment in OneAnswer Frontier Pension, OneAnswer Term Allocated Pension or OptiMix Term Allocated Pension.

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

Financial adviser

Your financial adviser will be authorised to receive and access your personal information, submit transaction requests on your behalf and to delegate such authority to any other person authorised by them in writing under the same dealer group and the licensee. If there is any change to your financial adviser, you are required to notify us of the change in writing.

Signature of member

(sign clearly within box)

X

Date (dd/mm/yyyy)

/ /

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
OnePath Stable	APS	
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		
Australian shares		
OptiMix Australian Shares	OPE	SL55/TL55
Global shares		
OptiMix Global Emerging Markets Shares		SL48/TL48
OptiMix Global Shares	OPI	SL56/TL56
Property		
OptiMix Property Securities	OPP	SL57/TL57
Single-manager investment funds		
Investor Profile 1 – Defensive		
ANZ Cash Advantage	YVX	SL02/TL02
Investor Profile 2 – Conservative		
Kapstream Absolute Return Income	MLX	SL37/TL37
OnePath Conservative Index		SL94/TL94
OnePath Diversified Bond Index		SL87/TL87
OnePath Diversified Fixed Interest	APV	SL27/TL27
Pendal Monthly Income Plus		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		
Ardea Real Outcome		SL84/TL84
Janus Henderson Diversified Credit	CFX	SL34/TL34
OnePath Balanced Index		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 Alternatives Growth	AGX	SL80/TL80
OnePath Growth Index		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		SL97/TL97
Australian shares		
Ausbil Australian Emerging Leaders	ADX	SL30/TL30
Bennelong Australian Equities		SL90/TL90
BlackRock Advantage Australian Equity	YAX	SL77/TL77
Fidelity Australian Equities	YPX	SL83/TL83
First Sentier Imputation	ZFX	SL33/TL33
Greencape Broadcap	AOX	SM11/TM11
Investors Mutual Australian Shares	ZJX	SL69/TL69
Merlon Australian Share Income	YMX	SL50/TL50
OnePath Australian Shares	APA	SL11/TL11
OnePath Australian Shares Index	VAX	SL39/TL39
OnePath Blue Chip Imputation	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
Perennial Value Shares	YCX	SL79/TL79
Perpetual Australian Shares	ZKX	SL40/TL40
Perpetual ESG Australian Share		SL53/TL53
Schroder Australian Equity	ZOX	SL68/TL68
Tyndall Australian Shares	ALX	SM08/TM08
Global shares		
Altrinsic Global Equities		SM20/TM20
Antipodes Global (Long only)		SL26/TL26
Arrowstreet Global Equity (Hedged)	ZAX	SL62/TL62
Barrow Hanley Concentrated Global Shares Hedged	ZIX	SL38/TL38
BlackRock Advantage International Equity	ZHX	SL71/TL71
Magellan Global	ZNX	SL42/TL42
MFS Global Equity	APF	SL21/TL21
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
Stewart Investors WorldWide Sustainability		SL52/TL52
T. Rowe Price Global Equity		SL86/TL86
Walter Scott Global Equity (Hedged)	AMX	SM09/TM09
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 RARE Infrastructure Value Hedged	YRX	SL85/TL85
First Sentier Global Listed Infrastructure	ANX	SM10/TM10
OnePath Global Listed Infrastructure Index		SM32/TM32
Closed funds		
MoneyForLife Index Balanced		SL93/TL93
MoneyForLife Index Conservative		SL91/TL91
MoneyForLife Index Moderate		SL92/TL92
OnePath Capital Guaranteed	APC	
Platinum Asia [†]	AJX	SM06/TM06
Platinum International [†]	ZMX	SL70/TL70
SG Hiscock Property [^]	ZLX	SL67/TL67

[^] This fund is not available to members who joined after 18 September 2017.

[†] 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.

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 Australian Shares	OPE1	OPE2
OptiMix Cash	OPA1	OPA2
OptiMix Global Share	OP11	OP12
OptiMix Global Smaller Companies Share	OPS1	OPS2
OptiMix Property Securities	OPP1	OPP2