

3. Important information for members/investors and signature

By completing and signing this form, you acknowledge and agree that:

- Oasis Asset Management and/or OnePath Custodians will change your financial adviser (as named in section 2) for the accounts listed above.
- You must no longer be receiving advice from your existing financial adviser in relation to account listed above.
- When Oasis Asset Management and/or OnePath Custodians process this form, your existing financial adviser will no longer be remunerated for advising you and will cease to have access to your information.
- For the account listed above, your new financial adviser will be responsible for advising you and will have access to your information, which may include your health information.
- The collection, use, storage and disclosure of your personal information (including where authorised and required, health and other sensitive information) will be handled as described in OnePath Custodian's Privacy Policy which is available at onepathsuperinvest.com.au/about-us/privacy-policy or by calling Customer Services.
- If you have provided information about another person (e.g. a beneficiary), you should obtain permission of that person to do so and should inform them that their information may be visible to the financial adviser named in this form and any other person authorised by the financial adviser. You should also direct them to OnePath Custodians' Privacy Policy which is available at onepathsuperinvest.com.au/about-us/privacy-policy or by calling Customer Services.
- OnePath Custodians/Oasis Asset Management may, acting reasonably, refuse to accept this authority.
- You release/discharge and indemnify OnePath Custodians/Oasis Asset Management properly acting on this authority, except to the extent that the liability, cost or loss is caused by the fraud, wilful misconduct or negligence of OnePath Custodians/Oasis Asset Management or its related entities (or their agents, employees, officers or contractors).
- All remuneration currently being paid for the accounts listed in this form will be paid to the financial adviser nominated in section 2.
- OnePath Custodians/Oasis Asset Management will rely on the information you provide to process your request. By signing and submitting this request form, you represent that the information you have provided is true and correct.

Signature of Member 1	X	Date (dd/mm/yyyy)	/ /
Signature of Member 2	X	Date (dd/mm/yyyy)	/ /

4. Adviser remuneration declaration (financial adviser only)

Only to be completed by financial advisers where an Ongoing or Fixed Term Arrangement Adviser Service Fee (ASF) is in place on the accounts listed above.

By signing below, I confirm and declare that:

- Where an ASF is nominated it is solely for advice in relation to the member's interest in the product.
- Where an ASF is nominated it is not part of an early release scheme.
- Where an ASF is nominated it is reasonable and is commensurate with the type and scope of the advice being provided.
- I have specifically drawn the member's attention to any nominated ASF and I have explained the implications and the effects of these fees being deducted from their accounts.

Signature of financial adviser	X	Date (dd/mm/yyyy)	/ /
Adviser name			
Licensee name			
Phone	Business	Mobile	
Email			
AFS License number			

Please note: You may cancel or amend your client's ASF at any time either online by logging into Account Access at access.onepathsuperinvest.com.au/adviser/AdviserOnline.aspx or by sending a request to adviser@onepathsuperinvest.com.au

Change of Adviser Request – Investment Portfolio

October 2025

OnePath Funds Management Limited (OnePath Funds Management)

ABN 21 003 002 800 AFSL 238342

Please Note: This form is ONLY to be used for changing the financial adviser for a OneAnswer Frontier Investment Portfolio, OneAnswer Investment portfolio, ANZ OneAnswer Investment Portfolio or OptiMix Trust account.

- For all other products, please complete Pages 1 and 2 only.
- Please note this form cannot be used to add a third party authority.
- Additionally, if you would like Adviser Transaction Authority (ATA) for this client, please locate the relevant ATA Form for the chosen product in the Forms & Brochures section on **onepathsuperinvest.com.au**

Please submit this form via email to **aps@onepathsuperinvest.com.au** or via post to the above postal address.

1. Investor type

Investor number

☐ Individual ☐ Joint ☐ Company ☐ Partnership ☐ Corporate Trustee

☐ Clubs, association or unincorporated body ☐ Investing on behalf of a child under 18

Name of Company/Partnership/Corporate Trustee/Club/Association/Unincorporated body (if applicable)

2. Investor details

Investor 1/ Trustee 1

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

Surname

Given name(s)
(including middle name)

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

Investor 2/ Trustee 2

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

Surname

Given name(s)
(including middle name)

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

Investor 3/ Trustee 3

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

Surname

Given name(s)
(including middle name)

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

Investor 4/ Trustee 4

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

Surname

Given name(s)
(including middle name)

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

3. Financial adviser details

Licensee Sales Account No.		Adviser Sales Account No.	
Licensee Name			
Name of financial adviser			
Phone		Business	
Email			

4. Declaration and signature (for client)

By completing and signing this form, I/we:

- Authorise OnePath Funds Management to change my/our financial adviser (as detailed in Section 3) for the OnePath accounts identified in the Investor Number in section 1.
- Confirm that I/we are no longer receiving advice from my/our existing financial adviser in relation to the account.
- Understand that upon OnePath Funds Management processing this form, my/our existing financial adviser will no longer be remunerated for advising me/us and will cease to have access to my/our information.
- For the OnePath account identified in Section 1, my/our new financial adviser will be responsible for advising me/us and will have access to my/our information.
- OnePath Funds Management may, acting reasonably, refuse to accept this authority.
- You release/discharge and indemnify OnePath Funds Management from any liability, cost or loss that is incurred as a result of OnePath Funds Management properly acting on this authority, except to the extent that the liability, cost or loss is caused by the fraud, wilful misconduct or negligence of OnePath Funds Management or its related entities (or their agents, employees, officers or contractors);
- Agree to be bound by provisions of the constitutions or trust deeds of the relevant investment funds in which I/we are an investor.
- Authorise all remuneration currently being paid for the account to be paid to the financial adviser nominated in Section 3.
- Understand my personal information will be handled in accordance with OnePath Funds Management's Privacy Policy which is available at onepathsuperinvest.com.au/about-us/privacy-policy. If I have provided information about another person in this application, I declare that I have the permission of that person to do so. I understand that OnePath Funds Management require me to inform the person concerned that I have done so and direct them to the relevant Privacy Policy so they may understand the manner in which their personal information may be used and disclosed by OnePath Funds Management.
- I/we declare that I/we have read this form and declare that the information provided is true and accurate.

Signature of Investor 1/Director 1/Trustee		Date (dd/mm/yyyy)	
Signature of Investor 2/Director 2/Trustee		Date (dd/mm/yyyy)	
Signature of Investor 3/Director 3/Trustee		Date (dd/mm/yyyy)	
Signature of Investor 4/Director 4/Trustee		Date (dd/mm/yyyy)	

5. Adviser remuneration declaration (financial adviser only)

Only to be completed by financial advisers where an Ongoing or Fixed Term Arrangement Adviser Service Fee (ASF) is in place on the accounts identified in Section 1.

By signing below, I confirm and declare that:

- Where an ASF is nominated it is reasonable and is commensurate with the type and scope of the advice being provided.
- I have specifically drawn the investors' attention to any nominated ASF and I have explained the implications and the effects of these fees for them.

Signature of financial adviser		Date (dd/mm/yyyy)	
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Please note: You may cancel or amend your client's ASF at any time either online by logging into Account Access at access.onepathsuperinvest.com.au/adviser/AdviserOnline.aspx or by sending a request to adviser@onepathsuperinvest.com.au