

Switch Request 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

Customer Services

Phone 133 665

Email client@onepathsuperinvest.com.au

Website onepathsuperinvest.com.au



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.

This form is for existing members to switch investment funds in:

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

Instructions

- When you complete this form, you must have read your Product Disclosure Statement (PDS) and any subsequent updates, Fees Guide, 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 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)

2. Auto-rebalance

Complete section 3 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. Auto-rebalance is not available on Term Allocated Pension.

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) from which my pension is paid.

Please complete the Future Pension Authority column in Section 3B – Switch to.



If you want to switch into 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 page 4) and investment fund name in the below section(s) for each investment selected. Only complete either the \$ switch column or % 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 only one column	
		Switch from amount (\$)	Switch from percentage (%)
		\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
		\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
		\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
		\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
		\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
		\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
		\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
		\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
		\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
		\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
Total		\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	

B. Switch to

Fund code	Investment fund name	Complete only one column		Future Pension Authority
		Switch to amount (\$)	Switch to percentage (%)	
		\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
		\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
		\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
		\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
		\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
		\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
		\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
		\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
		\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
		\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
		\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Total		\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	or 1 0 0 %	1 0 0 %

4. 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, please nominate a new single investment fund. Otherwise, the ASF will be deducted proportionately across all your investment funds*. Alternatively, you can choose to change the way an existing Ongoing 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* ☐

Please ensure that you sign the declaration on page 3

5. Important information for applicants and signature

Important: The terms and conditions for your new investment fund(s) may be different from your previous investment. Your PDS provides details of the terms and conditions for your changed investment. If you require a copy of the PDS, it is available free of charge 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.

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 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 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, 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.

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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 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.

Signature of applicant

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	N/A
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	N/A	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
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
ANZ Term Deposit – 3 years	TP23, TP29	TP17
ANZ Term Deposit – 3 years (TTR)	N/A	TT17
ANZ Term Deposit – 5 years	N/A	TP18
ANZ Term Deposit – 5 years (TTR)	N/A	TT18
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		
Ardea Real Outcome	N/A	SL84/TL84
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 Alternatives Growth	AGX	SL80/TL80
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
Bennelong Australian Equities	N/A	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	N/A	SL53/TL53
Schroder Australian Equity	ZOX	SL68/TL68
Tyndall Australian Shares	ALX	SM08/TM08
Global shares		
Altrinsic Global Equities	N/A	SM20/TM20
Antipodes Global (Long only)	APJ	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	N/A	SL52/TL52
T. Rowe Price Global Equity	N/A	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	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
OnePath Capital Guaranteed [‡]	APC	N/A
Platinum Asia [†]	N/A	SM06/TM06
Platinum International [†]	ZMX	SL70/TL70
SG Hiscock Property ^{^^}	ZLX	SL67/TL67

N/A – Not available

‡ These funds are closed. Switches into these funds cannot be accepted.

†† MoneyForLife investment funds are not available to members not already invested in these funds.

^^ 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	OPI1	OPI2
OptiMix Global Smaller Companies Share	OPS1	OPS2
OptiMix Property Securities	OPP1	OPP2