

3. Request for transfer of funds

From

I hereby instruct you to transfer to the Retirement Portfolio Service the amount of my super/rollover fund which is detailed below.

 total value **or** partial value \$, .

Fund details – paying institution

Financial institution	<input type="text"/>		
Fund name	<input type="text"/>		
Unique Superannuation Identifier (non-SMSF)	<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"/> <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"/>		
Member number	<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"/> <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"/>		
Address of paying institution	<input type="text"/>		
Suburb/Town	<input type="text"/>	State	<input type="text"/> Postcode <input type="text"/>
Country	<input type="text"/>	Phone number of paying institution	<input type="text"/>

If the amount you wish to transfer to OneAnswer Frontier Personal Super is from a previous employer’s superannuation fund, please state:

Name of employer	<input type="text"/>		
Date ceased employment	(dd/mm/yyyy)	<input type="text"/>	<input type="text"/>

For SMSFs only

Please transfer my benefit from the following fund (Transferring fund details) :

Account name	<input type="text"/>		
BSB number	<input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/>	Bank Account number	<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"/>
Fund ABN	<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"/>		
Electronic Service Address (ESA)	<input type="text"/>		

To

Fund details – receiving institution

Financial institution	ONEPATH CUSTODIANS PTY LIMITED		
Fund name	RETIREMENT PORTFOLIO SERVICE		
Unique Superannuation Identifier	MMF0334AU		
Address of receiving institution	GPO BOX 5306		
Suburb/Town	SYDNEY	State	NSW Postcode 2001
Country	AUSTRALIA		
Phone number of receiving institution	133 665		

4. Approval to transfer

- I hereby give authority to you to provide all relevant information and any other documentation to the Trustee of the Retirement Portfolio Service and my financial adviser regarding the transfer amount.
- I understand that the trustee of my previous fund is discharged from any liability in respect of any amount transferred.
- I approve the deduction of any applicable transfer fees, exit fees and taxes from the benefit being transferred (subject to legislative restrictions).
- 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 authorise the transfer of any contribution still to be made by my previous employer that may be received after my benefits have been transferred to the Retirement Portfolio Service.
- I understand that, in certain circumstances, the Trustee of the Retirement Portfolio Service may be required to deduct tax from the untaxed element of any amount transferred.
- I consent to the collection, use, storage and disclosure of my personal information (including health and other sensitive information) as described in OnePath Custodians' Privacy Policy which is available at onepath.com.au/superandinvestments/privacy-policy
If I have provided information about another person in this application (for example a life insured), I declare that I have the consent of that person to do so. I understand that OnePath Custodians requires me to inform the person concerned that I have done so and direct them to the Privacy Policy which is located at onepath.com.au/superandinvestments/privacy-policy so they may understand the manner in which their personal information (including health and other sensitive information) may be used and disclosed by OnePath Custodians.
- To the best of my knowledge, my other superannuation fund(s) is a complying superannuation fund under the *Superannuation Industry (Supervision) Act 1993*.
- Retirement Portfolio Service is a regulated and complying superannuation fund under the *Superannuation Industry (Supervision) Act 1993*.

Signature of applicant

X

Date (dd/mm/yyyy)

/

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Letter of Compliance

OneAnswer Frontier Personal Super and Pension

1 August 2021

OnePath Custodians Pty Limited

To whom it may concern,

I confirm the following statements on behalf of OnePath Custodians Pty Limited (**Trustee**), the trustee of Retirement Portfolio Service (**Fund**).

Complying superannuation fund

The Fund is a complying, resident, regulated superannuation fund under the *Superannuation Industry (Supervision) Act 1993 (SIS Act)*. The Fund is not subject to a direction under section 63 of the *SIS Act*, nor does it expect to receive such a direction.

Contributions

The Fund is able to accept superannuation guarantee contributions as well as other additional employer contributions.

The trust deed governing the Fund also allows benefits to be transferred from other resident regulated superannuation funds into the Fund, and allows benefits to be transferred or rolled over from the Fund to other resident regulated funds.

Members may only cash preserved benefits in circumstances permitted by the *SIS Act*.

The trustee of the transferring fund or life company is required to make its payment in accordance with the relevant laws and standards.

Further details

Further details relating to the Fund appear in the table below.

Fund details	
Fund name	Retirement Portfolio Service
Australian Business Number (ABN)	61 808 189 263
Unique Superannuation Identifier (USI)	OneAnswer Frontier Personal Super MMF0334AU OneAnswer Frontier Pension MMF0333AU
Fund contact details	Customer Services GPO Box 5306 Sydney NSW 2001 Telephone 133 665 weekdays between 8:30am and 6:30pm (AEST) Email customer@onepath.com.au Website onepath.com.au