

Superannuation Transfer Form

OneAnswer Frontier Personal Super

5 December 2025

OnePath Custodians Pty Limited (OnePath Custodians)

ABN 12 008 508 496 AFSL 238346 RSE L0000673

Oasis Asset Management Limited (Oasis Asset Management)

ABN 68 090 906 371 AFSL 553529

Retirement Portfolio Service (Fund)

ABN 61 808 189 263 RSE R1000986 SFN 4571 159 75

GPO Box 5306, Sydney NSW 2001

Customer Services

Phone 133 665 or +61 3 7049 3126
outside Australia.

Email client@onepathsuperinvest.com.au

Website onepathsuperinvest.com.au

Instructions

- **Please forward this form to your existing financial institution to transfer funds from a non-OnePath superannuation fund to the Retirement Portfolio Service.**
- If you want to transfer more than one fund, please photocopy this form. You may be requested by your existing fund to forward details or sign additional documents. Please action this as soon as possible. Please be aware that other financial institutions may impose a fee when you withdraw from their fund. There may also be delays in having your money transferred from your existing fund.
- To prevent delays in your transfer, please ensure all details are completed and attach your most recent statement from your existing fund as well as proof of identity (see Section 2)

Information for members wanting to claim a tax deduction in their existing account

- If you make a full withdrawal or rollover you must claim a tax deduction in your existing account prior to the withdrawal/rollover.
- If you make a partial withdrawal or rollover you will only be able to claim a tax deduction in your existing account on a proportional basis.
- If you make a withdrawal or rollover you may only be able to vary your notice on a proportional basis.
- If you are aged 67 or above and want to claim a tax deduction, you will need to meet the work test or work test exemption to claim a tax deduction. If you do not meet the work test or work test exemption in respect of any amounts you are unable to vary your notice (e.g. because you have made a withdrawal/rollover), the ATO will disallow the deduction and we may not be able to refund tax already deducted.
- Rollovers in this section include transfers between OnePath administered funds.

Other important information

- If you wish to request a contribution split, you must do so prior to rolling out of your existing fund (including transferring between OnePath administered funds) by completing a Superannuation Contribution Splitting Application form.
- Moving funds (including terminal medical condition payments) may have taxation, investment and insurance implications, we recommend you consult with your adviser.
- We are required to give your tax file number to the fund transferring your benefit to us. If you do not want us to do this, please notify us in writing.

1. Applicant details

Title Mr Mrs Ms Miss Dr Other

Surname

Given name(s)
(including middle name)

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

Residential address
(this cannot be a PO Box)

Suburb/Town State Postcode

Country Contact phone

If you would like to transfer your funds to an existing OneAnswer Frontier Personal Super account, please quote Member number (otherwise a new account will be opened). -

Tax file number - -

Please refer to the section titled 'Providing your tax file number (TFN)' in the OneAnswer Frontier Personal Super and Pension PDS before providing your TFN.

2. Proof of identity

I have attached a certified copy of my current driver's licence or passport **or**

I have attached certified copies of **both**:

Birth/Citizenship Certificate or Centrelink Pension Card **and**

Centrelink payment letter or Government notice* (less than one year old) with name/address.

* Notice issued by Commonwealth, State or Territory within the past 12 months that contains your name and residential address. For example:

- Tax office Notice of Assessment
- Rates notice from local council.

3. Request for transfer of funds

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 \$, .

From

Fund details – paying institution

Financial institution	<input type="text"/>		
Fund name	<input type="text"/>		
Unique Superannuation Identifier	<input type="text"/>		
Member number	<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	<input type="text"/> / <input type="text"/> / <input type="text"/>	(dd/mm/yyyy)	

To

Fund details – receiving institution

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

Information you provide

We will rely on the information you give us to process your request. By signing and submitting this transfer form, you represent that the information you have provided is true and correct.

Privacy

Your personal information will be handled in accordance with the One Path Custodians' Privacy Policy, which is available at onepathsuperinvest.com.au/about-us/privacy-policy. The privacy policy outlines how the Trustee manages your personal information and contains details about any likely overseas disclosure of your personal information, how you may access or correct your personal information and how you may complain about a breach of your privacy.

Before you submit this application

Before you submit this application, we recommend that you inform yourself about the consequences of a transfer of your benefits from your transferring fund. The implications may include termination of any insurance cover in the transferring fund and deduction of fees and taxes from your benefit by the trustee of the transferring fund (or the deduction of taxes from untaxed component of your transfer by the trustee). If you are requesting a partial transfer, you should also consider any remaining minimum balance requirements in the transferring fund.

You can ask the trustee of the transferring fund for information that you reasonably require for the purpose of understanding any benefit entitlements that you may have, including:

- information about any fees or charges that may apply to the proposed benefit transfer, and
- information about the effect of the proposed benefit transfer on any benefit entitlements you may have.

You should only submit this form if you have obtained any information you reasonably require, or you do not require such information.

Your contributions

If a full transfer has been requested, you should request that any contributions received by your previous fund after payment of your benefit be transferred to your account in the Fund.

If you have an existing account and have made personal contributions, a notice of intent or variation must be lodged before a transfer. After transfer, you may not be able to lodge a notice or a variation for your existing contributions, and tax may not be refunded. You should be aware that the ATO will disallow a deduction on contributions made after age 67 if the work test or work test exemption is not met.

Authorisation

By signing and submitting this form, you request the transfer of your super benefit as set out in this form and authorise OnePath Custodians as Trustee of the Fund and the trustee of the transferring fund to give effect to this transfer (including by sharing any information about your benefit in the transferring fund necessary to effect this transfer).

Signature of applicant

Date (dd/mm/yyyy)

Letter of Compliance

OneAnswer Frontier Personal Super and Pension

5 December 2025

OnePath Custodians Pty Limited
 GPO Box 5306
 Sydney NSW 2001

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
Superannuation Fund Number (SFN)	4571 159 75
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 or +61 3 7049 3126 outside Australia weekdays 8:30am to 6:30pm (AEST/AEDT) Email client@onepathsuperinvest.com.au Website onepathsuperinvest.com.au