

Total and Permanent Disablement Claim Application Form

1 February 2020

Retirement Portfolio Service (Fund)

ABN 61 808 189 263, RSE R1000986

OnePath Custodians Pty Limited (OnePath Custodians, Trustee)

ABN 12 008 508 496 AFSL 238346 RSE L0000673

347 Kent Street, Sydney NSW 2000

Customer Services

Phone 133 665

Email customer@onepath.com.au

Website onepath.com.au

Please note:

- This form must be completed in full to enable processing of your claim.
- Incomplete forms will result in a delay in processing your request for early release.
- The trustee reserves the right to request further information including medical reports at the cost of the member.
- Please attach a separate sheet if you require more room for a particular answer.
- Please complete this form and send to:
OnePath
GPO Box 5306
Sydney NSW 2001

Member Number

Name of Fund/Plan

Surname

Given name(s)
(including middle name)

Address

State Postcode

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

State your employment history, beginning with your occupation at the time of your disablement. Please state years of employment beside each occupation.

On what date did you last work?.....Date (dd/mm/yyyy) / /

Secondary/Tertiary/Trade Qualifications

Type? Secondary – to what year? Date (dd/mm/yyyy) / /

TAFE University

Completed? Yes No

Trade/Course Qualification?

Other Training

Name(s) of organisation	Name(s)/Type of course	When undertaken

Please state the nature of the condition(s) which has caused you to cease work.

Names of two registered medical practitioners you have consulted.

Declaration

I, (Name)
of (Address)

Declare that the information given in this form is true and correct in every detail. I authorise any person, hospital, doctor who has been or will be attending me, or any employer, or any insurer to furnish OnePath Custodians Pty Limited any information that it may require in the consideration of this claim.

I acknowledge that I have read, understood and agree to the 'Privacy Statement' contained in this form. I accept that the collection, use and disclosure of my personal information is necessary for the purpose of administering my claim. I understand that OnePath Custodians will not be able to process my claim without this information.

I consent to the collection, use, storage and disclosure of my personal information (including health and other sensitive information) as described in the Privacy Statement set out in this form (refer to page 3) and 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 beneficiary or 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 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.

Signature Date (dd/mm/yyyy)

Signature of Witness[†] Date (dd/mm/yyyy)

Name of Witness

Occupation

[†] Signature to be witnessed by anyone who is prescribed as being able to witness a Statutory Declaration under the *Statutory Declarations Regulations 2018*. For example, Australia Post employee, Bank Officer (both must have 5 years continuous service), Justice of the Peace or legal practitioner, except when signed in the presence of an Officer of the Trustee.

Privacy statement

In this section 'we', 'us' and 'our' refer to OnePath Custodians Pty Limited and other members of the IOOF Group. We collect your personal information (including health and other sensitive information) from you to manage and administer our products and services. We may need to disclose it to certain third parties. Without your personal information, we may not be able to process your application/contributions or provide you with the products or services you require.

We are committed to ensuring the confidentiality and security of your personal information. Our Privacy Policy details how we manage your personal information.

In order to issue and undertake the management and administration of our product issue and services, it may be necessary for us to disclose your personal information to certain third parties. Unless you consent to such disclosure we will not be able to consider the information you have provided and may not be able to provide you with the product or service you have requested.

Providing your information to others

The parties to whom we may routinely disclose your personal information (including health and other sensitive information) include:

- an organisation that assists us and/or us to detect and protect against consumer fraud
- organisations, including those in an alliance with us, to distribute, manage and administer our products and services, carry out business functions and undertake analytics activities
- organisations performing administration and compliance functions in relation to the products and services we provide
- organisations providing medical or other services for the purpose of the assessment of any insurance claim you make with us (such as reinsurers)
- our solicitors or legal representatives
- organisations maintaining our information technology systems
- organisations providing mailing and printing services
- persons who act on your behalf (such as your agent or financial adviser)
- regulatory bodies, government agencies, law enforcement bodies and courts.

We will also disclose your personal information in circumstances where we are required by law to do so. Examples of such laws are:

- The *Family Law Act 1975* (Cth) enables certain persons to request information about your interest in a superannuation fund
- There are disclosure obligations to third parties under the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006*.

Information required by law

We may be required by relevant laws to collect certain information from you. Details of these laws and why they require us to collect this information are contained in our Privacy Policy at onepath.com.au/superandinvestments/privacy-policy

Overseas recipients

We may disclose information to recipients (including service providers and related companies) which are (1) located outside Australia and/or (2) not established in or do not carry on business in Australia. You can find details about the location of these recipients in our Privacy Policy at onepath.com.au/superandinvestments/privacy-policy

Marketing and privacy

We and other members of the IOOF Group may use your personal information (including health and other sensitive information) to send you information about our financial products or services from time to time.

We and IOOF may also disclose your personal information (including health and other sensitive information) to our related companies and organisations in an arrangement or alliance with us and/or IOOF to share information for marketing purposes. This is to enable them or IOOF to tell you about a product or service offered by them or a third party with whom they have an arrangement.

If you do not want us to use and disclose your information as set out above, phone Customer Services on 133 665 to withdraw your consent.

If you wish to authorise any other parties to act on your behalf, to receive information and/or undertake transactions, please notify us in writing.

Privacy policy

Our Privacy Policy contains information about:

- when we may collect information from a third party
- how you may access and seek correction of the personal information we hold about you
- how you can raise concerns that we have breached the Privacy Act or an applicable code and how we will deal with those matters.

You can contact us about your information or any other privacy matter as follows:

OnePath

GPO Box 5367

Sydney NSW 2001

Phone 133 665

Email superprivacy@onepath.com.au

We may charge you a reasonable fee for this.

If any of your personal information is incorrect or has changed, please let us know by contacting Customer Services.

More information can be found in our Privacy Policy which can be obtained from our website at onepath.com.au/superandinvestments/privacy-policy