

# Change of Details Form

## Ordinary

**This form is to be used when changing details to a non superannuation product**

Please avoid delays by checking that all questions have been answered fully and where appropriate use BLOCK LETTERS.



Policy number

### Instructions

This form should be completed if you wish to change details on your account.

Please tick (✓) one of the following:

Personal Investment Plan

Traditional Endowment or Whole of Life

Please complete all relevant sections and forward to:

OnePath, Locked Bag 994, North Sydney NSW 2059

### 1. Policy owner details

Title Mr  Mrs  Ms  Miss  Dr  Other

Surname

Given name(s)

### 2. Change of contact details

Residential address (this cannot be a PO Box)

Suburb/Town

State

Postcode

Phone

Home

Business

Mobile

Email

### 3. Change of name

Title Mr  Mrs  Ms  Miss  Dr  Other

Surname

Given name(s)

Please attach evidence of your change of name, such as a certified copy of your marriage certificate or deed poll.

#### 4. Change of nominated financial institution account

The following financial institution account will be debited for the Investment Plan

Name of financial institution

Full account name

BSB number

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Account number

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I/We acknowledge that this direct debit arrangement is governed by the terms of the Direct Debit Request Service Agreement on page 4.

I/We understand that where a deduction is dishonoured, a dishonour fee will be charged and a processing fee may also be charged by my/our financial institution each time a regular investment is made.

All financial institution account signatories must sign below.

Signature of account holder A

X
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Date

/	/
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Signature of account holder B

X
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Date

/	/
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#### 5. Change of nominated beneficiary(ies)

Beneficiaries can only be nominated where the policy owner(s) is/are also the life/lives insured.

Full name of nominated beneficiaries	Address	Relationship to policy owner	Date of birth	Proportion of death benefit %
1.			/ /	%
2.			/ /	%
3.			/ /	%
4.			/ /	%
5.			/ /	%
and your Estate		Not applicable	Not applicable	
<b>Total (must add up to 100%)</b>				<b>100%</b>

Note: You can only nominate your estate or a person(s) who is a dependant to receive your death benefit.

## 6. Declaration and signature

By completing this form,

- I consent to the collection, use, storage and disclosure of my personal information as described in the Privacy Policy and the Privacy Statement contained in the PDS (including discussing any information obtained from me and any doctors or accountants with the financial adviser associated with this application). OnePath's Privacy Policy is available at [onepath.com.au/about-us/privacy-policy](http://onepath.com.au/about-us/privacy-policy).
- If I have provided personal information about any identified person, I declare that I have their permission to do so and I have informed them of the Privacy Policy and the Privacy Statement.
- I consent to (and request where required) OnePath contacting me in relation to this application, to administer any policy that is issued, and for any other purpose consistent with the Privacy Policy and Privacy Statement.
- I authorise OnePath to use my personal information to send me information about other products and services that may be of interest to me. I understand that I may phone Customer Care on 1800 646 706 to advise that I do not want OnePath to use my information for marketing purposes
- consent to phone conversations being recorded and listened to for training purposes or to provide security for transactions
- acknowledge that the performance of any investment fund is not guaranteed by OnePath or any other person, unless otherwise stated
- acknowledge that for transactions by direct debit, the unit price will be the one determined on the day funds are received in our bank account
- state that the statements made in this form are true and correct

Signature of Policy owner 1

X

Date

Signature of Policy owner 2

X

Date

# Direct Debit Request Service Agreement

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Please keep this document in a safe place

## Our commitment to you

Drawing arrangements:

- Where the due date falls on a non-business day, we will draw the amount on the next business day.
- We will not change any details of drawings arrangements without giving you at least fourteen (14) days written notice.
- We reserve the right to cancel the OnePath drawing arrangements if three or more drawings are returned unpaid by your nominated financial institution and to arrange with you an alternate payment method.
- We will keep all information pertaining to your nominated account at the financial institution, private and confidential unless otherwise required by the Bulk Electronic Clearing System (BECS) rules. You acknowledge that we may be required to disclose details of your direct debit request to our sponsor bank to assist with the checking of any incorrect or wrongful debits to your nominated account.
- We will only arrange for funds to be debited from your account as authorised in the Direct Debit Request.

Your rights:

- You may terminate the OnePath drawing arrangements at any time by giving written notice directly to us, or through your nominated financial institution. Notice given to us should be received by us at least 14 days prior to the due date.
- You may stop payment of a drawing under the OnePath arrangement by giving written notice directly to us, or through your nominated financial institution. Notice given to us should be received by us at least 14 days prior to the due date.
- You may request change to the drawing amount and/or frequency of OnePath drawings by contacting us and advising your requirements no less than 14 days prior to the due date.
- Where you consider that a drawing has been initiated incorrectly [outside the OnePath arrangements], you should notify us directly as soon as possible so that we can resolve your query. Alternatively you can take it up directly with your financial institution.
  - If we conclude as a result of our investigations that your account has been incorrectly debited we will respond to your query by arranging for your financial institution to adjust your account (including interest and charges) accordingly. We will also notify you in writing of the amount by which your account has been adjusted.
  - If we conclude as a result of our investigations that your account has not been incorrectly debited we will respond to your query by providing you with reasons and any evidence for this finding in writing.

## Your commitment to us

Your responsibilities:

- You should check:
  - a. with your financial institution whether direct debiting is available from your account as direct debiting is not available on all accounts offered by financial institutions;
  - b. your account details which you have provided to us are correct by checking them against a recent account statement, and;
  - c. with your financial institution before completing the Direct Debit Request if you have any queries about how to complete the Direct Debit Request.
- It is your responsibility to ensure that sufficient funds are available in the nominated account to allow a debit payment to be made in accordance with the Direct Debit Request. If there are insufficient funds in your account to meet a debit payment:
  - a. You may be charged a fee and/or interest by your financial institution
  - b. You may also incur fees or charges imposed or incurred by us; and
  - c. You may arrange for the debit payment to be made by another method or arrange for sufficient clear funds to be in your account by an agreed time so that we can process the debit payment.
- It is your responsibility to ensure that the authorisation given to draw on the nominated account is identical to the account signing instruction held by the financial institution where the account is based.
- It is your responsibility to advise us if the account nominated by you to receive the OnePath drawings is transferred or closed.
- It is your responsibility to arrange with us a suitable alternate payment method if you wish to cancel the OnePath drawing.