

# PENSION TO SUPER SWITCH FORM (EXISTING SUPER ACCOUNTS ONLY)

## GROW WRAP SUPER AND PENSION SERVICE

Grow Wrap

OnePath Custodians Pty Limited (OPC) ABN 12 008 508 496 AFSL 238346 RSE L0000673. The Retirement Portfolio Service ABN 61 808 189 263 RSE R1000986

**Use this form to switch your pension account from income stream phase to accumulation phase using your existing super account in the same product. This form cannot be used when a new account is required to be opened, please use the online application and switching tool to open new accounts.**

- If you wish to refresh your existing pension account with new monies please use the *Pension Update request form* instead.
- Please complete and submit the forms below if you wish to take up other **optional features** that are available on your Super account.
- Existing ongoing adviser and administration fee arrangements will continue on your account, where your account number remains the same. If you're creating a new account (ie a new account name and/or number) existing adviser and administration fee arrangements will not be applied to your new account. Please refer to the current Product Disclosure Statement (PDS) for the administration fees that will apply to your new account.
- Where your account number remains the same, any existing advice fee consents will be rolled over with your account. Otherwise, your adviser is required to complete the digital Advice Fee Consent Form available on the Adviser Online portal before any advice fees will be charged.

| Optional features for your account   | Super |
|--------------------------------------|-------|
| Direct deposit facility request      | ✓     |
| Direct debit request                 | ✓     |
| Non-lapsing death benefit nomination | ✓     |
| Change of account fees               | ✓     |
| Rollover authority form              | ✓     |

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## Details of your existing accounts

Account name:

Date of birth:

Occupation:

Existing pension account switching **from** account number:

Existing super account switching **to** account number:

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## Transfer details

### AMOUNT TO BE TRANSFERRED TO THE SUPER ACCOUNT

Note that while there are outstanding transactions we will be prevented from giving effect to a request for a transfer of the full balance. Your request will not take effect until all outstanding transactions have settled.

**Entire balance** (your existing account will be closed).

**Partial amount** by one of the following methods:

transferring: \$  from the above account to the new account, OR

leaving: \$  in the above account and transferring the rest to the new account.

## Transfer details (continued)

**Mandatory:** If you have selected **Partial amount** above, please specify the assets (including cash) to be transferred out of or remain in the existing account (depending on your election). If there is insufficient room, please attach an additional page to your request.  
*Missing or incomplete information may delay the processing of the switch of asset(s).*

| Asset description | Value | Units | Transfer full holding (please ✓) |
|-------------------|-------|-------|----------------------------------|
| Cash              | \$    |       |                                  |
|                   | \$    |       |                                  |
|                   | \$    |       |                                  |
|                   | \$    |       |                                  |
|                   | \$    |       |                                  |
|                   | \$    |       |                                  |
|                   | \$    |       |                                  |
|                   | \$    |       |                                  |

Note:

- for listed securities you must transfer the full holding or the number of units. You cannot select a dollar value
- term deposits must be transferred in full
- term deposit maturity instructions and dividend reinvestment plans will be reset to 'cash' for all assets transferred. Your adviser will need to update these instructions online.

**⚠ Importantly, you must leave the required minimum balance in the account – refer to the Product Disclosure Statement (PDS) for minimum account balances.**

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## Declaration and signature

By completing this form, you accept and agree to be bound by the terms and conditions contained in the Grow Wrap Super and Pension Service Product Disclosure Statement. If you do not already have a copy of the relevant offer document you can obtain it from our website at [wrapinvest.com.au](http://wrapinvest.com.au) or by contacting us.

Signature:

Date:

Title:

Full name:

Please complete and return the form to **Grow Wrap, GPO Box 3154, Sydney NSW 2001** or via email to [service@wrapinvest.com.au](mailto:service@wrapinvest.com.au).

If you have any queries about completing this form please contact us on **1800 095 825**.