

OnePath Custodians Pty Limited (OPC) ABN 12 008 508 496 AFSL 238346 RSE L0000673 is the issuer of the Grow Wrap Super and Pension Service and the Trustee of the Retirement Portfolio Service ABN 61 808 189 263 RSE R1000986

Use this form to roll your superannuation benefits into your Grow Wrap Super Service account.

- Do not cancel any existing insurance cover until your application for insurance has been assessed and accepted by your platform insurer. If you do not want your current insurance cover cancelled, do not complete this rollover authority.
- Ensure that your existing investment is clearly detailed below for the institution from which you are transferring.
- You do not need to complete this form if you are transferring from another Grow Wrap superannuation fund.
- Rolling over your super benefit to Grow Wrap may limit your ability to lodge or vary deduction notice for personal contributions made to the fund from which you are transferring.
- If you have multiple account numbers with this fund, please complete a separate form for each account you wish to transfer.
- Please complete, sign and return this request to Grow Wrap.

PLEASE USE BLACK INK AND PRINT IN CAPITALS. MARK BOXES WITH AN [X] WHERE APPLICABLE.

1

Rollover details



Please contact your existing superannuation provider to confirm if they have any additional requirements before they can action this rollover authority. Please complete all details and ensure that you provide us with a valid Australian Business Number (ABN) and Unique Superannuation Identifier (USI).

To (paying institution):	<input type="text"/>		
Street name and number:	<input type="text"/>		
Suburb:	<input type="text"/>	State: <input type="text"/>	Postcode: <input type="text"/>
Phone number (paying institution):	<input type="text"/>		
Account/membership/policy number:	<input type="text"/>		
Account/membership/policy name:	<input type="text"/>		
ABN:	<input type="text"/>		
USI:	<input type="text"/>		
Amount to be transferred:	<input type="checkbox"/> Entire balance (your account will be closed)		
	If partial amount, please specify: \$ <input type="text"/>		
Grow Wrap account receiving the transfer:	<input type="checkbox"/> Grow Wrap Super Service (USI – 61808189263180)		
	<input type="checkbox"/> Grow Wrap Pension Service (USI – 61808189263181)		

2

Personal details

Title: Full given name(s):

Surname:

Date of birth: Gender: Male Female

Account number:

Postal address


Street number and name or PO Box:

Suburb: State: Postcode:

Residential address (leave blank if the same as your mailing address)

Street name and number:

Suburb: State: Postcode:

 If your personal details have changed, you may need to contact your existing superannuation provider and update their records before they action this authority.

3

Cheque details

Required when an electronic rollover payment is not being made by the paying superannuation fund.

Please forward the cheque for the Transfer, this original completed form and any other relevant documentation to:

Grow Wrap GPO Box 3154 Sydney NSW 2001

The following address Name:

Address:

Cheque should be made payable to: **OPC – Grow Wrap (client name)**

4

Proof of identity (optional)

Your existing superannuation provider may require documentation with this transfer request to prove you are the person to whom the superannuation entitlements belong. We encourage you to contact your existing superannuation provider to determine what documentation is required.

I have attached a certified copy of my driver's licence or passport (optional)

CERTIFICATION OF PERSONAL DOCUMENT REQUIREMENTS

All copied pages of ORIGINAL proof of identification documents (including any linking documents) need to be certified as true copies by any individual approved to do so (see below). The person who is authorised to certify documents must sight the original and the copy and make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping 'certified true copy' followed by their signature, printed name, qualification (eg Justice of the Peace, Australia Post employee, etc) and date.

The following can certify copies of the originals as true and correct copies:

- a permanent employee of Australia Post with five or more years of continuous service
- a finance company officer with five or more years of continuous service (with one or more finance companies)
- an officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), having five or more years continuous service with one or more licensees
- a notary public officer
- a police officer
- a registrar or deputy registrar of a court
- a Justice of the Peace
- a person enrolled on the roll of a State or Territory Supreme Court or the High Court of Australia, as a legal practitioner
- an Australian consular officer or an Australian diplomatic officer
- a judge of a court
- a magistrate, or a Chief Executive Officer of a Commonwealth court.

5

Declaration and signature

I hereby request that the rollover institution named above complete the transfer of benefits from my account/policy to OnePath Custodians Pty Limited (OPC) ABN 12 008 508 496 AFSL 238346 RSEL RSE L0000673 as trustee of The Retirement Portfolio Service ABN 61 808 189 263 RSE R1000986, a superannuation fund established to comply with the requirements of the Superannuation Industry (Supervision) Act. By giving this authorisation to transfer my benefits:

- I hereby give the rollover institution named above authority to provide any and all relevant information to OPC.
- I discharge the trustee of my previous fund from any further liability in respect of my superannuation benefit once the transfer to OPC has been completed.
- I am aware that I may ask the trustee of my previous fund for information to understand any benefit entitlements that I may have, including information about any fees or charges that may apply to the rollover, or information about the effect of the rollover on any benefit entitlements I may have, and I do not require any further information.
- I authorise the deduction of any withdrawal and/or termination fees that may be applicable as a result of the transfer.

Signature

Date:

Full given name(s):

Surname:

Grow Wrap Super and Pension Service Letter of Compliance

14 April 2016

To whom it may concern,

I confirm the following statements on behalf of OnePath Custodians Pty Limited (OPC) (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.

Grow Wrap Super Service offers insurance that meets the minimum requirements set out in the *Superannuation Guarantee (Administration) Act 1992*.

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

Further details

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

Fund details	
Fund name	Retirement Portfolio Service
Australian Business Number (ABN)	61 808 189 263
Superannuation Fund Number (SFN)	457 115 975
Unique Superannuation Identifier (USI)	
Grow Wrap Super Service	61808189263180
Grow Wrap Pension Service	61808189263181
Fund contact details	Grow Wrap GPO Box 3154 Sydney NSW 2001 Phone: 1800 094 423, weekdays 8am to 7pm (AEST) Email: customer@wrapinvest.com.au Website: wrapinvest.com.au

Kind regards,

Peter Mullin

Director
OnePath Custodians Pty Limited