

Certificate of survival

IMPORTANT: The information requested in this Certificate is required for OnePath to continue paying regular income payments from your Annuity. **Income payments may cease if the Certificate is not returned within a reasonable period.** In this event, suspended payments will be paid upon receipt of the completed Certificate.



Instructions

- This Certificate is to be completed by the Annuitant shown in Section 1, or another person on behalf of the Annuitant where the Annuitant is unable to sign (see Section 3).
- Before returning the Certificate to OnePath, you must verify your identity. This can be done by **either** having an authorised person confirm your identity, or by providing self-certification (see Section 5).
- This completed Certificate should be returned to OnePath within the requested timeframe using one of the following methods:
 - By **post** (see Section 6); or
 - By **email** to **client.service@zurich.com.au**
- Any costs involved in getting this Certificate verified will be your responsibility.

1. Annuitant's

Surname		
Given name(s)	Date of birth	/ /
Residential address	State	Postcode
OnePath Annuity number (if known)		
Contact details: Mobile	Email	

2. Annuitant signature

Signature	Date
X	/ /

If you are unable to sign due to physical, psychiatric or intellectual disability, or due to illiteracy, another person may sign on your behalf by completing Section 3.

3. Details of person signing on behalf of Annuitant (if Annuitant is unable to sign)

IMPORTANT: Please attach evidence of the Annuitant's inability to sign this form (eg letter explaining reason why Annuitant is unable to sign, or legal/medical documents, Social Worker report)

Name of Person		
Relationship to Annuitant		
Address	State	Postcode
Contact details: Mobile	Email	

I declare that the Annuitant is alive but unable to sign due to physical, psychiatric or intellectual disability, or due to illiteracy.

Signature	Date
X	/ /

4. Your privacy

OnePath is bound by the *Privacy Act 1988 (Cth)*. In completing the forms or questions herein you will be providing us with your personal and, perhaps, sensitive information. The collection and management of this information is governed by the *Privacy Act 1988*. For a more detailed explanation of OnePath's Privacy Policy, please visit our website at www.onepath.com.au or contact the OnePath Privacy Officer on 1800 646 706 or email us at insurancefeedback@onepath.com.au.

5. Certification of Annuitant's identity

The identity of the Annuitant must be verified by **either**:

- (a) one of the authorised persons listed in Section 8 of this Certificate, or
- (b) self-certification.

5 (a) Authorised person certification

As a person authorised to verify your identity, it is essential they see you and sight adequate identification to satisfy themselves as to your true identity.

- Satisfactory identification would be official papers or documents that include a photograph of you. Suitable documents include:
 - passport
 - identification card
 - other official government documents.
- If you are unable to provide any photographic identification, the authorised person should be certain of your identity from other sources before verifying your identity.
- To verify your identity, the authorised person must complete the details below.

Details of authorised person (to be completed by the authorised person)

Name of authorised person

Occupation or designation (see Section 8)

Address

State

Postcode

Contact phone number

Documentation provided for identification of Annuitant

I declare that I have seen the Annuitant on this day and I am satisfied as to the identity of the Annuitant.

Signature of authorised person

Date

X

/ /

Official stamp or seal of authorised person (if applicable)

5 (b) Self-certification

If you elect to self-certify please do the following:

- Provide a photograph of yourself, holding up your signed valid passport, Government ID card or driver licence. The photograph needs to clearly show your face, together with the image on the identity document. Please ensure that all details on the ID are as clear as possible.
- Send a copy of your photograph together with a clear scanned copy or photograph of the identity document you are holding and return to OnePath with the completed **Certificate of survival**.

6. Return completed Certificate

Please return this completed Certificate in the Reply Paid Envelope provided, or post to (postage free):

Customer Service Team

OnePath

Reply Paid 91116

North Sydney NSW 2059

Or email the completed Certificate to client.service@zurich.com.au

7. Support is available if you have questions

We are to help you if you have any questions when completing this Certificate. Please feel free to either:

- Call our toll-free number, **1800 646 706**, between 8.30am to 7.00pm Monday to Thursday or 8.30am to 5.30pm Friday AEST, or
- Email us at client.service@zurich.com.au

Alternatively, you may contact your financial adviser if you have a question in relation to your individual circumstances.

8. Persons who can verify your identity

The people below can verify your identity for the purposes of your Certificate of Survival.

- A person who is enrolled on the roll of the Supreme Court of a state or territory, or the High Court of Australia, as a legal practitioner (however described)
- An officer with, or authorised representative of, a holder of an Australian Financial Services Licence, having two or more continuous years of service with one or more licensees
- A person licensed under a current state or territory law to practise in any of the following occupations:
 - Chiropractor
 - Dentist
 - Legal practitioner
 - Medical practitioner
 - Nurse
 - Optometrist
 - Patent attorney
 - Pharmacist
 - Physiotherapist
 - Psychologist
 - Trade-marks attorney
 - Veterinary surgeon
- Also a person falling within any of the following categories:
 - Agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
 - Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the Consular Fees Act 1955)
 - Bailiff
 - Bank officer with two or more continuous years of service
 - Building society officer with two or more years of continuous service
 - Chief Executive Officer of a Commonwealth court
 - Clerk of a court
 - Commissioner for Affidavits
 - Commissioner for Declarations
 - Credit Union officer with two or more years of continuous service
 - Employee of the Australian Trade Commission who is:
 - in a country or place outside Australia; and
 - authorised under paragraph 3 (d) of the Consular Fees Act 1955; and
 - exercising his or her function in that place
 - Employee of the Commonwealth who is:
 - in a country or place outside Australia; and
 - authorised under paragraph 3 (c) of the Consular Fees Act 1955; and
 - exercising his or her function in that place
 - Fellow of the National Tax Accountants' Association
 - Finance company officer with 2 or more years of continuous service
 - Holder of a statutory office not specified in another item
 - Judge of a court
 - Justice of the Peace
 - Magistrate
 - Marriage celebrant registered under Subdivision C of Division 1 of Part IV of the Marriage Act 1961
- Master of a court
- Member of Chartered Secretaries Australia
- Member of Engineers Australia, other than at the grade of student
- Member of the Association of Taxation and Management Accountants
- Member of the Australian Defence Force who is:
 - an officer; or
 - a non-commissioned officer within the meaning of the Defence Force Discipline Act 1982 with two or more years of continuous service; or
 - a warrant officer within the meaning of that Act
- Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the National Institute of Accountants
- Member of:
 - the Parliament of the Commonwealth; or
 - the Parliament of a state; or
 - a territory legislature; or
 - a local government authority of a state or territory
- Minister of religion registered under Subdivision A of Division 1 of Part IV of the Marriage Act 1961
- Notary Public
- Permanent employee of the Australian Postal Corporation with two or more years of continuous service who is employed in an office supplying postal services to the public
- Permanent employee of:
 - the Commonwealth or a Commonwealth authority; or
 - a state or territory or a state or territory authority; or
 - a local government authority; with two or more years of continuous service who is not specified in another item in this Part
- Person before whom a statutory declaration may be made under the law of the state or territory in which the declaration is made
- Police officer
- Registrar, or Deputy Registrar, of a court
- Senior Executive Service employee of:
 - the Commonwealth or a Commonwealth authority; or
 - a state or territory or a state or territory authority
- Sheriff
- Sheriff's officer
- Teacher employed on a full-time basis at a school or tertiary education institution
- Member of the Australasian Institute of Mining and Metallurgy
- An officer with, or a credit representative of, a holder of an Australian credit licence, having two or more years of continuous service with one or more licensees
- A person who, in the country of where the identity documents are certified, is or is the equivalent of a:
 - Justice of the Peace
 - Notary Public
 - Court Official
 - Legal practitioner holding a current practicing certificate
- Person authorised by local law to witness court documentation, official documents or identity documents.