



END OF FINANCIAL YEAR 2024 - STATEMENT AVAILABILITY 1 JULY 2024

End of financial year statements for members and investors in the following products will be available for you to securely view and download online from mid August.

- ANZ Smart Choice Super and Pension
- ANZ Smart Choice Super for employers and their employees
- ANZ Smart Choice Super for QBE Management Services Pty Ltd and their employees
- ANZ OneAnswer Term Allocated Pension
- ANZ OneAnswer Investment Portfolio
- ANZ Retail Trusts
- ANZ Investment Bond
- ANZ Flexible Income Fund
- ANZ Deferred Annuity
- ANZ Maxisafe Deferred Annuity
- ANZ Cash Rollover Fund
- ANZ Wholesale Trusts.

Please see below for statement mailing dates.

For superannuation and pension annual statements, the following pages cover some Frequently Asked Questions that may be helpful when reading your statement.

HOW CAN 2024 ANNUAL STATEMENTS BE VIEWED ONLINE?

For the ANZ Smart Choice Super suite of products (comprised of ANZ Smart Choice Super and Pension, ANZ Smart Choice Super for employers and their employees, ANZ Smart Choice Super for QBE Management Services Pty Ltd and their employees).

Log in at www.anz.com.au/smartchoiceaccess or via ANZ Internet Banking at www.anz.com.au

- select your ANZ Smart Choice Super account and access using your email address and password
- select the 'Transactions' tab, click on the 'financial year' where you will be able to 'view statements'.

For all other ANZ products:

Log in at www.anz.com.au, select 'Investor Access' from the drop-down menu and use your unique online user ID and password to access your account and view your statement.

Please note that statements for ANZ Smart Choice Super Defined Benefit and ANZ Wholesale Investment Trusts are not available online.

WHEN WILL YOU RECEIVE YOUR 2024 ANNUAL STATEMENTS?

Hardcopy statements will be progressively mailed to members and investors from late July through September.

Please note that if you have registered to access your ANZ Smart Choice Super account via Online Access and have chosen to receive your communications online, you will not receive a hard copy of your statement, unless you have specifically requested to have your statement mailed.

MAILING DATES

The expected mailing dates are outlined below. We will keep you informed of any changes as they occur.

Product	Section 290-170 Notice	PAYG Payment Summary	Statement Mailing date
ANZ Smart Choice Super and Pension	Mid July	Before 14 July	Early to mid August
ANZ Smart Choice Super for employers and their employees	Mid July	N/A	Early August to late September
ANZ Smart Choice Super for QBE Management Services Pty Ltd and their employees	Mid July	N/A	Late August to late September
ANZ OneAnswer Term Allocated Pension	N/A	Before 14 July	Mid to late August
ANZ OneAnswer Investment Portfolio	N/A	N/A	Quarterly Statements: mid August
ANZ Retail Trusts			Tax statements: mid to late August
ANZ Investment Bond	N/A	N/A	Mid September
ANZ Flexible Income Plan	N/A	N/A	Mid September
ANZ Deferred Annuity	N/A	N/A	Early September
ANZ Maxisafe Deferred Annuity	N/A	N/A	Early September
ANZ Cash Rollover Fund	N/A	N/A	Early September
ANZ Wholesale Investment Trusts			Quarterly Statements: late July Tax statements: mid to late August

ANY QUESTIONS?

If you have any questions or require further information, please contact Customer Services for the relevant product, as set out in the table below:

Product	Phone number	Hours (weekdays AEST/AEDT)
ANZ Smart Choice Super suite of products	13 12 87 option 1	8.30am – 6.30pm
ANZ OneAnswer Investment Portfolio	13 38 63	8.30am – 6.30pm
ANZ Retail Trusts		
ANZ Investment Bond		
ANZ Flexible Income Plan		
ANZ Deferred Annuity		
ANZ Maxisafe Deferred Annuity		
ANZ Cash Rollover Fund		
ANZ Wholesale Investment Trusts	1800 031 810	9.00am – 5.00pm

Contact us

ANZ Smart Choice Super



13 12 87



smartchoice@insigniafinancial.com.au

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This information is current as at June 2024 and may be subject to change.

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