

September 2021

Version 3

Sun Life Online Payment Page

Additional Investments



Sun Life
Asset Management



Content Outline

Introduction

General Guidelines

Online Payment Page Guide

Introduction

Sun Life Online Payment Page

Add to your peso-denominated Sun Life Prosperity Fund through the **Sun Life Online Payment Page**.

- ✓ Invest through our website directly from your bank account
- ✓ Transaction will be processed on the same day*
- ✓ No need to submit additional proof of payment or form
- ✓ No transaction fee!

Payment partner

- ✓ BPI



**Transactions within the daily cut-off time will be processed using the applicable NAVPS/ NAVPU at the end of business day.*



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General Guidelines

Eligibility

Existing SLAMCI clients who are BPI deposit account holders may make additional investments through the Online Payment Page.

Account Type	Eligibility
Individual	✓
In-Trust-For	✓
Worksite	✓
Joint OR	✓
Joint AND	✗
Corporate	✗
Group	✗

General Guidelines

Fund Name

Mutual Fund	Fund Name
Sun Life of Canada Prosperity Bond Fund	Bond Fund
Sun Life of Canada Prosperity Balanced Fund	Balanced Fund
Sun Life of Canada Prosperity Philippine Equity Fund	Equity Fund
Sun Life Prosperity Peso Starter Fund (formerly Money Market Fund)	Peso Starter Fund
Sun Life Prosperity GS Fund	Government Securities Fund
Sun Life Prosperity Philippine Stock Index Fund	Index Fund
Sun Life Prosperity Achiever Fund 2028	Achiever Fund 2028
Sun Life Prosperity Achiever Fund 2038	Achiever Fund 2038
Sun Life Prosperity Achiever Fund 2048	Achiever Fund 2048
Sun Life Prosperity World Equity Index Feeder Fund	World Equity Index Feeder Fund

General Guidelines

Applicable NAVPS/ NAVPU

- Transactions within the daily cut-off time will be processed using the applicable NAVPS/ NAVPU at the end of business day.
- Transactions received after the cut-off time or during weekends and holidays will be processed on the next business day.

	Applicable NAVPS/NAVPU
World Equity Index Feeder Fund	T+2
All other peso-denominated Funds	T+0

General Guidelines

Minimum and Maximum Investment Amount

- Minimum Investment Amount

	Additional Investment	Initial Investment
Peso Starter Fund	PHP 100	PHP 100
World Equity Index Feeder Fund	PHP 10,000	PHP 50,000
All other peso-denominated Funds	PHP 1,000	PHP 1,000

- Maximum Investment Amount: PHP 50,000 per day per BPI account

General Guidelines

Differences between the Sun Life Online Payment Page and the BPI Bills Payment Facility

Features	Sun Life Online Payment Page	BPI Electronic Bills Payment
Channel	Sun Life website (sunlife.com.ph)	BPI Online (online.bpi.com.ph) BPI Mobile App
Pricing	Applicable NAVPS/NAVPU at the end of business day (T+0)	Applicable NAVPS/NAVPU at the end of the next business day (T+1)
Cut-off time	SLAMCI cut-off time: 11:00 AM	BPI cut-off time: 10:00 PM
Procedure	Does not require enrollment prior to payment	Requires enrollment of Fund as biller prior to payment
Maximum Investment Amount	PHP 50,000	No limit



Content Outline

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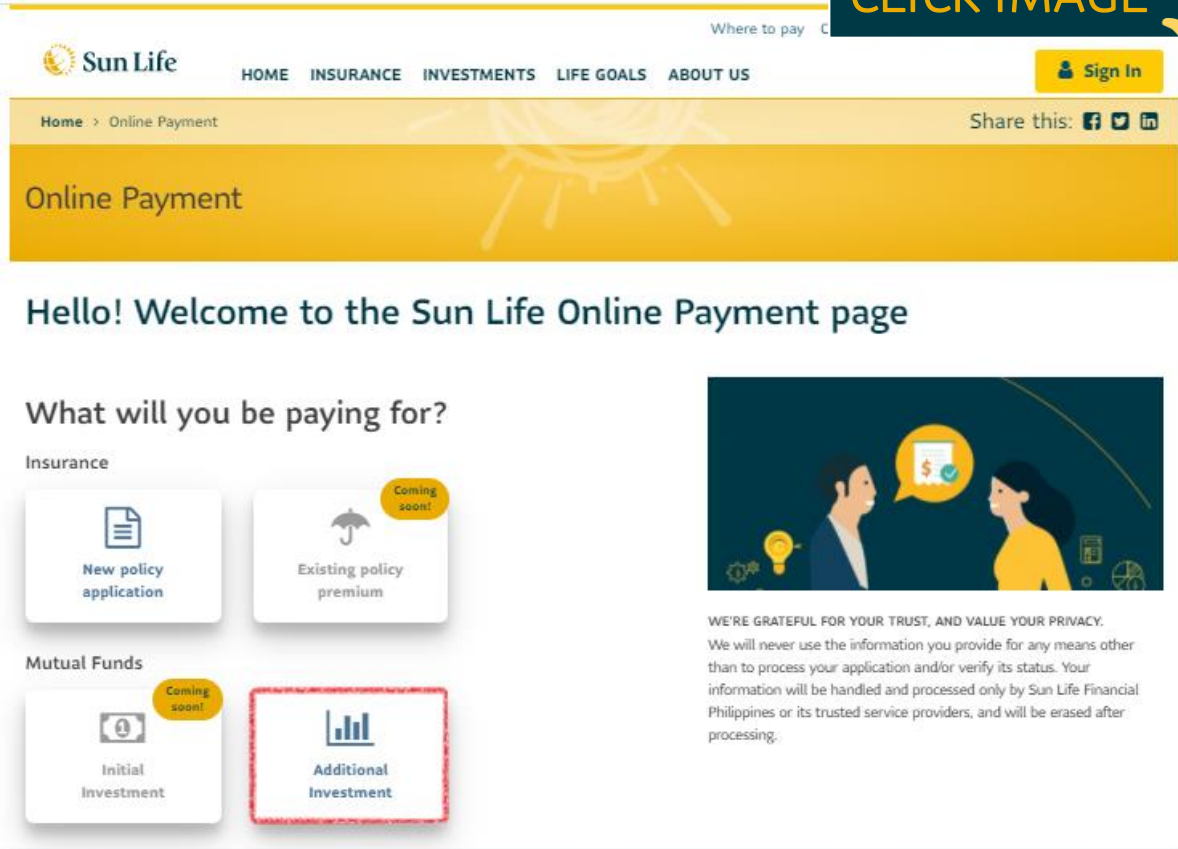
Online Payment Page Guide

Online Payment Page Guide

Step 1

Go to bit.ly/sunlifeonlinepayment.
Under Mutual Funds, select Additional Investment.

CLICK IMAGE 



Where to pay

Sun Life HOME INSURANCE INVESTMENTS LIFE GOALS ABOUT US Sign In

Home > Online Payment Share this: [Facebook] [Twitter] [LinkedIn]

Online Payment

Hello! Welcome to the Sun Life Online Payment page

What will you be paying for?

Insurance

- New policy application
- Existing policy premium Coming soon!

Mutual Funds

- Initial Investment Coming soon!
- Additional Investment**

WE'RE GRATEFUL FOR YOUR TRUST, AND VALUE YOUR PRIVACY. We will never use the information you provide for any means other than to process your application and/or verify its status. Your information will be handled and processed only by Sun Life Financial Philippines or its trusted service providers, and will be erased after processing.

Online Payment Page Guide

Step 2

Input investment details, and click Next.

Mutual Funds

Initial Investment

Coming soon!

Additional Investment

We will never use the information you provide for any means other than to process your application and/or verify its status. Your information will be handled and processed only by Sun Life Financial Philippines or its trusted service providers, and will be erased after processing.

Great! Please enter the following information:

FUND NAME	SALES LOAD ⓘ		
Index Fund	Front-end		
FIRST NAME	LAST NAME	EMAIL ADDRESS	ACCOUNT NUMBER ⓘ
Juan	dela Cruz	juandelacruz@gmail.com	12345678CF01
Next			


Online Payment Page Guide

Step 3

Input investment amount, and select payment method.

Got it, Juan!

Here's what you'll be paying for:

 Additional investment
Index Fund
Sales load: Front-end
Account number: 12345678CF01

A payment confirmation will be sent to:

juandelacruz@gmail.com

Transactions received after the cut-off time or during weekends and holidays will be processed on the next business day.

How much will you be paying?

ENTER AMOUNT

[What's the minimum amount?](#)

How would you like to pay for it?



You can invest a maximum amount of PHP 50,000 per day using your BPI account.

Online Payment Page Guide

Step 4

In the Investor Attestation Page, click I Agree. Proceed to payment.

Online Payment

Dear **Juan Dela Cruz**,

You're about to make a **Bank Online Fund Transfer** using the Sun Life online payment page.

By clicking "I Agree. Proceed to payment", you agree and confirm that:

- a. The Bank Account you will use for payment is issued under your name,
- b. If SLAMCI believes that you may be involved in any potentially fraudulent or suspicious activity, it may take any action to protect Sun Life and its representatives, including but not limited to, cancelling your application as a result thereof, and
- c. Your payment information will be provided to, and will be processed by, a third party payment service provider.

Cancel

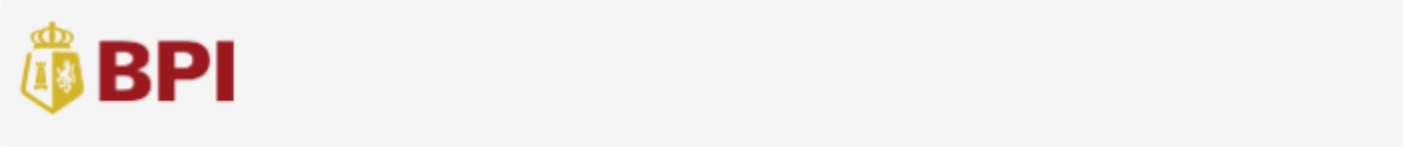
I Agree. Proceed to payment

Online Payment Page Guide

Step 5

Click the tick box to view the Terms and Conditions.

You're almost there!



Please confirm the following details below:

Name of Client	Juan Dela Cruz
Mutual Fund	Index Fund
Account Number	12345678CF01
Sales Load	Front-end load

Total Amount **PHP 1,000.00**

By using this service, you confirm your agreement to be bound by the **Terms and Conditions** under Sun Life Online Payment service.


Back

Proceed to payment

Online Payment Page Guide

Step 6

Scroll down to read the Terms and Conditions, and click Accept.



Terms and Conditions

(Please scroll down to read and accept)

court orders, legal requirements, valid subpoena issued by pertinent authority, or such other cause which necessitates a transfer or disclosure of said information. You agree to hold SLAMCI free and harmless from any liability that may arise from any transfer, disclosure or storage of said information. You also acknowledge that SLAMCI, its employees, duly authorized representatives, related companies, third party service providers, and vendors shall process and share your information with any person or organization to (i) service your account, (ii) process the Transactions and enforce these Terms, and (iii) pursue its legitimate and lawful rights and interests and other purposes allowed under privacy laws and regulations. Your personal data shall be retained throughout the existence of your account(s) and/or until expiration of the retention limit set by laws and regulations from account closure and the period set for destruction or disposal of records. You certify that you have read, understood, and agreed with the declarations and authorizations above, including Sun Life's privacy policy found in <https://apps.sunlife.com.ph/privacy>.

Decline

Accept

Online Payment Page Guide

Step 7

Log in to your BPI account.



Good day!

By entering your BPI Online Banking account username and password on this BPI Authentication page and clicking 'Accept', you hereby authorize BPI to link your BPI Online Banking account to SLAMCI INDEX FUND, subject to BPI's Terms and Conditions linked below.

When deemed necessary by BPI, it may require additional verification, such as, but not limited to, sending a One-Time Pin via SMS to your BPI-registered mobile number prior to effecting your BPI Online Banking account transaction/s in accordance with BPI's Terms and Conditions.

BPI will not share any of your account information (including personal data) with any third-party except in accordance with BPI's Terms and Conditions.

Username

Password

Accept

Please view BPI's Terms and Conditions [here](#).



Online Payment Page Guide

Step 8

Select the account from which your payment will be debited from, and click **Submit**.

Pay with BPI online



PHP 1,000.00

SLAMCI Index Fund

Select a BPI account

- SAVINGS ACCOUNT
- SAVINGS ACCOUNT
- SAVINGS ACCOUNT

xxxxxx1234

xxxxxx2345

xxxxxx3456

Submit

Online Payment Page Guide

Step 9

Review your payment details, and click Proceed to payment.

You're almost there!

Please confirm your details below:

Product
SLAMCI Index Fund

Type of Payment
BPI online

From account no.
XXXXXX2345

Amount
PHP 1,000.00

Edit account no.

Proceed to payment

Online Payment Page Guide

Step 10

Enter the OTP, and click Submit OTP.

Enter one time pin



Please enter the one time PIN sent to the number below:

+63917****123

Not your number? Please visit a BPI branch near you to update your number.

1 2 3 4 5 6

Submit OTP

Didn't receive an OTP? [Resend](#)

Await your transaction confirmation.
Congratulations on your investment!

Reminder: There is no need to submit additional proof of payment or form.

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Connect with us

For transaction clarification, verification, and other account-related concerns, please get in touch with us through the following:

(02) 8-849-9888

sunlink@sunlife.com

www.sunlifefunds.com



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