



REWARD REDEMPTION FORM

Back-End Sales Load Investments

Applicable only to clients solicited/served by MF advisors

IMPORTANT. The deadline for submission of the redemption forms is on **January 31, 2024 (Wednesday)**, close of business day. Please send to **PHIL-SLAMCI-AgencySales@sunlife.com**.

DATE OF SUBMISSION

INVESTOR INFORMATION

Please tick and fill out the boxes with the corresponding account name, account number, total amount invested, and date invested.

ACCOUNT TYPE	ACCOUNT NAME	ACCOUNT NUMBER	DATE OF INVESTMENT	TOTAL AMOUNT INVESTED
<input type="radio"/> Individual Account	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/> Joint AND/OR Account (including ITF accounts)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/> Institutional Account	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
TOTAL INVESTMENT			₱ <input type="text"/>	US\$ <input type="text"/>

Sun Life Financial Advisor Name Branch

Email to be used to receive eGC reward

REWARD INFORMATION

Type	One-Time or Accumulated Investment Amount	Reward
Instant Reward	PHP 1,000,000 (or USD equivalent) in BACK-END LOADED Sun Life Prosperity Funds*	PHP 6,000 for every PHP 1,000,000 (or USD equivalent)

*PARTICIPATING SUN LIFE PROSPERITY FUNDS

PH PESO-DENOMINATED

Philippine Equity Fund
 Philippine Stock Index Fund
 Balanced Fund
 Bond Fund
 GS Fund
 Achiever Funds (2028, 2038, 2048)
 World Equity Index Feeder Fund

USD-DENOMINATED

Dollar Advantage Fund
 Dollar Abundance Fund
 Dollar Wellspring Fund
 World Voyager Fund

TOTAL REWARD VALUE

(to be filled out by SLAMCI)



REWARD REDEMPTION FORM

IMPORTANT NOTES ON EARLY REDEMPTION OF INVESTMENTS

Back-End Sales Load Investments

- Subject to a 5-year holding period
- Subject to the following redemption fees (inclusive of VAT) as indicated in the Prospectus and below:

- First Year - 5.60%
- Second Year - 4.48%
- Third Year - 3.36%
- Fourth Year - 2.24%
- Fifth Year - 1.12%
- After the Fifth Year - NONE

PRIVACY NOTICE

By signing this form, you agree that Sun Life Asset Management Company, Inc. ("Company") shall process your personal data to: a) evaluate your application and administer the promotion; b) determine your eligibility to claim rewards; c) process transactions and enforce/fulfill contractual rights/obligations; d) improve the provision of products and services (including improvement in systems and business processes, data analytics, automated processing, etc.); d) comply with legal obligations, as well as laws and regulations (domestic or foreign); and e) manage risks and pursue its legitimate interests, including verification and obtaining additional personal data from third party sources.

The Company may disclose your personal data to its affiliates, service providers, and other third parties for processing consistent with the foregoing purposes, who shall be bound by contractual or other reasonable means to protect your personal data. Your personal data shall be retained for the duration or existence of your account(s) and/or upon the later of the expiration of the retention limit set by Company standards, and by laws and regulations, counted from account closure.

You certify that you understand and agree with the declarations and authorizations above and the Company's privacy policy at <https://online.sunlife.com.ph/privacy>.

ACKNOWLEDGEMENT

I/We hereby understand that by joining SLAMCI's Invest for Rewards promo, I/we confirm that:

- I/We have read, understood, and agreed to the Promo Mechanics and Terms and Conditions;
- I/We acknowledge that all information written in this document are confirmed and valid and will be used by SLAMCI and its partner merchants for the purpose of processing my reward redemption

_____ Please sign here _____

_____ Please sign here _____

_____ Please sign here _____

 Signature Over Printed Name

 Signature Over Printed Name

 Signature Over Printed Name