

INVEST for Rewards

REWARD REDEMPTION FORM

OPTION B: BACK-END LOAD

(Applicable only to clients solicited/served by MF advisors, direct clients, and Sun Life employees and advisors)

Note: Deadline to submit this form is on or before **January 31, 2023 (Tuesday), close of business day.**

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
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Individual Account

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Joint AND/OR Account
(including ITF accounts)

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Institutional Account

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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TOTAL INVESTMENT

₱

US\$

Advisor/Relationship Manager's Name
and Branch

REWARD INFORMATION

Type	One-Time or Accumulated Investment Amount	Reward
Instant Reward	PHP 1,000,000 (or USD equivalent) in any loaded funds	PHP 6,000 for every PHP 1,000,000 (or USD equivalent)

TOTAL REWARD VALUE
(to be filled out by SLAMCI)



IMPORTANT NOTES ON EARLY REDEMPTION OF INVESTMENTS

For Option B/Back-End Sales Load Investments

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

- First Year - 5%
- Second Year - 4%
- Third Year - 3%
- Fourth Year - 2%
- Fifth Year - 1%
- After the Fifth Year - NONE

PRIVACY NOTICE

By signing this form, you agree to the processing of your personal and sensitive personal information for the additional purpose of implementing your request/instructions to administer the Invest for Reward promotion in accordance with Sun Life Asset Management Company, Inc.'s (SLAMCI) Privacy Policy available at <https://online.sunlife.com.ph/privacy>, reaffirm your consent to the processing of your personal data as recorded in your most recent SLAMCI application form, and acknowledge that such consent continues to be in full force and effect.

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