



# REWARD REDEMPTION FORM

Back-End Sales Load Investments

**IMPORTANT:**

This form is applicable only to clients of solicited or serviced by MF Advisors, direct clients, Sun Life employees, and advisors. The deadline for submission of redemption forms is on January 31, 2025 (Friday), close of business day. Please send to [PHIL-SLAMCI-AgencySales@sunlife.com](mailto:PHIL-SLAMCI-AgencySales@sunlife.com).

## INVESTOR INFORMATION

DATE OF SUBMISSION

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     |
|--|----------------------|----------------------|------------------------|---------------------------|
| Individual Account                               | <input type="text"/> | <input type="text"/> | <input type="text"/>   | <input type="text"/>      |
| Joint AND/OR Account<br>(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"/>      |
| Institutional Account                            | <input type="text"/> | <input type="text"/> | <input type="text"/>   | <input type="text"/>      |
| TOTAL INVESTMENT                                 |                      |                      | ₱ <input type="text"/> | US\$ <input type="text"/> |

MF Advisor's Name  Branch

Client's email to be used to receive eGC reward

## REWARD INFORMATION

| Type           | One-Time or Accumulated Investment Amount              | Reward (Giftaway eGC)   |
|----------------|--|---|
| Instant Reward | PHP 1,000,000 (or USD equivalent) in any loaded funds* | <b>PHP 6,000</b> for every <b>PHP 1,000,000</b> (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
- World Income Fund New Fund!

**USD-DENOMINATED**

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

**TOTAL REWARD VALUE**

(to be filled out by SLAMCI)

Indicate Client's Desired Denomination (in QTY)

- |        |        |
|--------|--------|
| P1,000 | P500   |
| P2,000 | P5,000 |



## 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 (VAT-inclusive) as indicated below:
  - First Year - 5.60%
  - Third Year - 3.36%
  - Fifth Year - 1.12%
  - Second Year - 4.48%
  - Fourth Year - 2.24%
  - After the Fifth Year - NONE

### PRIVACY NOTICE

By submitting this form, you agree that Sun Life Asset Management Company, Inc. (the "Company") shall process your personal data, photos, or videos to enable us to contact you regarding the INVEST FOR REWARDS promo and its promotional activities. The Company may disclose your personal data, photos, or videos on managed platforms, as well as to its affiliates, service providers, and other third parties consistent with the foregoing purpose, and to comply with legal obligations, as well as laws and regulations (domestic or foreign). Your rights include the right to be informed, access your data, and rectify errors in your data.

For more information about your rights and how we protect your data, you may access our privacy policy at <https://online.sunlife.com.ph/privacy>. Should you have any concerns in relation to your rights or the processing of your personal data, you may get in touch with our Data Protection Officer at [privacyconcern@sunlife.com](mailto:privacyconcern@sunlife.com).

### TERMS AND CONDITIONS

Terms and conditions apply. Visit [sunlife.co/IFR2024](https://sunlife.co/IFR2024) for complete terms and conditions.

### ACKNOWLEDGEMENT

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

- a. I/We have read, understood, and agreed to the Mechanics, Terms and Conditions of the promo;
- b. 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  
(Investor A)

\_\_\_\_\_  
Signature Over Printed Name  
(Investor B)

\_\_\_\_\_  
Signature Over Printed Name  
(Investor C)