

Application for an Advance (Loan)



For Company Use Only
Pick up Date : _____
Pick up Time : _____
Pick up Location : _____
Received Date : _____

In this application, **“you” and “your”** refer to person(s) whose information we are processing or disclosing. **We, us, our** and **the Company** refer to Sun Life of Canada (Philippines), Inc., a member of the Sun Life group of companies.

You hereby request the Company for an advance in accordance with the Advances Provision of the Policy. The Policy and all assignments or other documents affecting the title of the Policy, if not already in the possession of the Company, should accompany this application for an advance.

Please write legibly by using capital letters. Write N/A if question is not applicable. Mark the box(es) with an “X” to indicate your choice(s) then sign the form when completely filled out.

1 General Information

Policy Owner (Last Name, First Name, M.I.)		Policy Number	
Citizenship		Country/ies of Legal Residence other than the Philippines	
Present Residence Address (No., Street, Municipality/City, Province, Country, Zip Code(P.O. Box is not acceptable))			
Permanent Residence Address (No., Street, Municipality/City, Province, Country, Zip Code(P.O. Box is not acceptable))			
Work Address (No., Street, Municipality/City, Province, Country, Zip Code(P.O. Box is not acceptable))			
Home Phone (Country Code, Area Code ,Tel. No)	Work Phone (Country Code, Area Code ,Tel. No)	Mobile Phone (Country Code, Mobile No.)	Email Address
Life Insured (Last Name, First Name, M.I.) if different from Policy Owner			

2 Request Details

You understand that you have the option to borrow against any dividend accumulation credited to the policy, withdraw any dividend accumulation, or to leave the dividend accumulation. In this connection, please tick option elected in the box provided.

- Option 1 Include any dividend accumulation in the calculation of the advance.
- Option 2 Withdraw any dividend accumulation. **You understand that if you withdraw any dividend accumulation, you may lose certain options available under the policy.** Please complete Dividend Authorization form if Option 2 is elected.
- Option 3 Leave the dividend accumulation.

The amount of the advance requested is:

Currency <input type="checkbox"/> US\$ <input type="checkbox"/> PHP	Amount in words and figures ()
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Special Instruction:

3 Acknowledgment and Agreement

This section must be signed by the policy owner, assignee and all of the nominated irrevocable beneficiaries and witnessed by an Advisor or Staff of Sun Life of Canada (Philippines), Inc. If signed before a disinterested witness, please have the form notarized by a notary public by affixing his/her signature and official seal at the back of this form.

If this form is signed outside the Philippines, please have the form authenticated or notarized by the nearest Philippine Consul in your locality.

If the policy owner or irrevocable beneficiary is a minor (less than 18 years of age) or incompetent, the legal guardian should sign on his/her behalf. Additional documents may be required from the said guardian. If any of the irrevocable beneficiaries has passed away, additional documents may be required. This applies to both death and endowment irrevocable beneficiaries.

By affixing your signature and presenting valid ID, you confirm, agree and hereby authorize the Company to honor and effect transactions on the basis hereof:

- You will inform us within 30 calendar days of any changes in your circumstances, including but not limited to citizenship(s)/nationality (-ies), and submit the applicable documents accordingly.
- You acknowledge the Company’s statutory responsibility to provide your information, including but not limited to local or foreign tax status, to the appropriate authority.




3 Acknowledgment and Agreement (continued)

- c. You acknowledge that the Company, its employees, duly authorized representatives, related companies, third party service providers, and vendors shall process and share your and the insured's information, with any person or organization to (i) service this account, (ii) process transactions and enforce contract, and (iii) pursue its legitimate and lawful rights and interests and other purpose allowed under laws and regulations, including but not limited to, those relating to data privacy and anti-money laundering.
- d. Your rights include the right to be informed, access your data, rectify errors, object to processing, and file a complaint. 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.
- e. You (i) agree to the processing of your personal data in accordance with, and for purposes declared in, the Company's Privacy Policy available at <https://online.sunlife.com.ph/privacy> and for the additional purpose of implementing your request/instructions herein; and (ii) reaffirm your consent to the processing of your personal data as recorded in your most recent insurance application form, and acknowledge that such consent continues to be in full force and effect.
- f. You agree to indemnify and hold free and harmless the Company, its affiliates, directors, employees, legal representatives, and assignees against loss and damage from any claims and/or actions made by any third person including the parties to this policy or their representatives in relation to the processing of this request.
- g. If release of proceeds is through Telegraphic Transfer - Credit to Account and/or Currency Conversion option, you confirm and agree that:
1. The information and details are correct and that you declare under the penalty of fraud that you are the owner of the stated bank account number;
 2. You will shoulder any bank charge fees and charges related to the deposit to your account;
 3. Deposit of the amount through your designated bank account number or account name fully releases and discharges the Company from any claims or liabilities related thereto;
 4. You shall indemnify and hold the Company free and harmless from and against any and all claims, losses, including opportunity loss, damages, or expenses as a result of your credit to account and/or currently conversion request, including any misrepresentation as to the owner of the bank account, and/or failure of your bank or its intermediary to honor the transaction.

Signature of Policy Owner X	Printed Name
(New) Signature Specimen X	(New) Signature Specimen X
Signature of Witness X	Printed Name
Address of Witness (no.,street,municipality,city/province,country,zip code) (If witness is a Sun Life Advisor, write the NBO and advisor's code, if Sun Life employee, write the Client Service Center)	
Place of Signing	Date of Signing Month - Day - Year

Signature of Assignee X	Printed Name	Date of Signing Month - Day - Year
Signature of Irrevocable Beneficiary, if any X	Printed Name	Date of Signing Month - Day - Year
Signature of Irrevocable Beneficiary, if any X	Printed Name	Date of Signing Month - Day - Year
Signature of Witness X	Printed Name	
Address of Witness (no.,street,municipality,city/province,country,zip code) (If witness is a Sun Life Advisor, write the NBO and advisor's code, if Sun Life employee, write the Client Service Center)		
Place of Signing	Date of Signing Month - Day - Year	

Let us serve you better! Updating made easier. You may now update your contact information via the Client Portal or Mobile App.

Option 1: Via Client Portal (www.sunlife.com.ph)	Option 2: Via Mobile App Download the Sun Life PH App at App/Play Store or Scan the QR code ->	
1. Visit sunlife.com.ph and click on the Sign In button. 2. Click Settings and select edit Contract Details/Mailing Address 3. Update relevant details then click Save .	1. Login to your Sun Life PH Mobile App 2. Click on Service Request and click Personal Details/Update Mailing Address 3. Click Edit button on your Mobile, International, Home, Business No., or Email Address and/or on your Permanent, Present, or Business Address 4. Update then click Save .	

For Company Use Only

Effective Date

4 Special Instruction

Indicate how you would want to receive the proceeds. Choose from the following options:

Note : Use BPI Remittance Intruccion Form for Pick Up at Any BPI Branch or Door-to-Door Delivery

Check (Deposit to account only)

RCBC Demand Draft (for US\$ policy)

Branch Address for Encashment

Telegraphic Transfer - Credit to Account and/or Currency Conversion

Mark "A" if request is for deposit to local bank. Mark "B" if request is for currency conversion and to deposit through cross border (overseas) transfer for clients living overseas.

A be credited to your bank account

B be converted to (please mark your preferred currency)

US Dollar

Canadian Dollar

*Others, please specify _____

Please provide the following information below:

Account Name	
Account Number	
Name of Bank	
Address of Bank	
Routing or Serial Number (applicable for letter B only)	Swift Code Number (applicable for letter B only)

*** Subject to availability of the currency in the bank**

Notes:

1. Please ensure that you provide the correct account information. The Company will not be liable if the remittance is credited to an erroneous bank account number.
2. Submit any of the following proofs of bank account:

Bank Statement of Account

First Page of the Passbook

ATM card (with account name and number)

Certificatate of Bank Deposit

Check (with account name)

The bank account number and the account name must appear on one (1) page and should be readable and clear.

Please mask account details and names of other account holders, if any. The Company may require presentation of additional documents to validate submission.

5 Notarization

Before me, a Notary Public for and in the City of _____, this _____ day of _____ 20____, _____ personally appeared before me and exhibited to me his/her (valid ID) _____ issued on _____ at _____, known to me and to me known to be the same person who executed the foregoing document that is duly signed by him/her and acknowledged to me that the same is his/her free and voluntary act and deed, consisting of _____ (____) pages including this page on which this Acknowledgment is written.

Doc No.: _____

Page No.: _____

Book No.: _____

Series of _____

AFAA.08.24

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Pick Up Stub for Application for An Advance

Please present this stub together with:

- a) One (1) Original Valid ID of Policy Owner
- b) One (1) Original Valid ID of Policy Owner and Representative if Policy Owner is unable to pick-up the check personally.
- c) Authorization Letter if Policy Owner is unable to pick-up the check personally (Please indicate the Policy Number)

Policy Number

Policy Owner

The check will be ready for pick up on:

Date	at	Place	Time
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