

# Name Change Request



In this form “**you**” and “**your**” refer to the policy owner, while **we, us, our,** and **the Company** refer to Sun Life of Canada (Philippines), Inc., a member of the Sun Life Financial group of companies.

## IMPORTANT NOTES:

You must accomplish and submit the completed form and a copy of your valid ID through any of our Client Service Centers or email to [sunlink@sunlife.com](mailto:sunlink@sunlife.com).

Please write legibly 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 only when completely filled out.

## A General Information

Please complete information below as it appears in the policy contract.

|  |                      |      |                      |
|--|----------------------|------|----------------------|
| 1. Policy Number(s)                      | <input type="text"/> |      |                      |
| <b>For Individual Policy Owner</b>       |                      |      |                      |
| Last Name                                | <input type="text"/> |      |                      |
| First Name                               | <input type="text"/> | M.I. | <input type="text"/> |
| <b>For Company/Business Policy Owner</b> |                      |      |                      |
| Company or                               | <input type="text"/> |      |                      |
| Business Name                            | <input type="text"/> |      |                      |

## B Name Change Details

|  |   |  |   |
|--|---|--|---|
| 2. Name Change For:  | <input type="checkbox"/> Policy Owner                       | <input type="checkbox"/> Life Insured          | <input type="checkbox"/> Company/Business |
| 3. Original Individual Name (Last Name, First Name, Middle Name)/Company or Business Name (as it appears in the policy contract) |   |  |   |
| 4. New Last Name/Company or Business Name  |   |  |   |
| 5. New First Name  |   |  |   |
| 6. New Middle Name   |   | 7. New Other Legal Name(s)                     |   |
| 8. Reason for Change:  | <input type="checkbox"/> Marriage                           | <input type="checkbox"/> Annulment             | <input type="checkbox"/> For Correction   |
|  | <input type="checkbox"/> Change in Company or Business Name | <input type="checkbox"/> Others, specify _____ |   |

Refer to page 2 for the list of requirements to submit.

## C Compliance with Regulatory Requirements

The following information is collected for regulatory compliance.

|   |
|---|
| 9. Has there been any change in your citizenship(s)/nationality(-ies) or country of legal residence?                              |
| <input type="checkbox"/> Yes, I am a citizen/national and a legal resident of _____ (specify country).                            |
| <input type="checkbox"/> Yes, I am a citizen/national of _____ (specify country) but I legally reside in _____ (specify country). |
| <input type="checkbox"/> None   |

## D Signatures

By signing, you confirm your understanding and agreement to the following:

- You will inform us within 30 calendar days of any change 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.
- 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 the contract, and (iii) pursue its legitimate and lawful rights and interests and other purposes allowed under laws and regulations, including, but not limited to, those relating to data privacy and anti-money laundering.
- 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://online.sunlife.com.ph/privacy>.
- 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](mailto:privacyconcern@sunlife.com).
- 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.



## D Signatures (continuation)


If the policy owner is not an individual (e.g. company/business), the signature and title of the authorized signatory is required.

### For Policy Owner/Authorized Signatory

|  |   |
|--|---|
| 10. Signature of Policy Owner  | 11. Printed Name                          |
| 12. Signature of Authorized Signatory #1 (For Company/Business Policy Owner) | 13. Printed Name and Job Title            |
| 14. Signature of Authorized Signatory #2 (For Company/Business Policy Owner) | 15. Printed Name and Job Title            |
| 16. Signature of Witness   | 17. Printed Name                          |
| 18. Place of Signing   | 19. Date of Signing<br>(e.g. 08-AUG-2008) |

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

20. Would you like to receive personalized communication and product offers from Sun Life of Canada (Philippines), Inc. (SLOCPI); Sun Life Financial Plans, Inc. (SLFPI); Sun Life Asset Management Company, Inc. (SLAMCI); and other members of the Sun Life Financial group that may help with your financial needs?     Yes     No

### For Office Use Only

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### List of requirements

|   |  |
|---|--|
| <b>Standard Requirements</b>                                | Name Change Request form<br>Valid ID of Policy Owner/Company's authorized signatory  |
| <b>Change of Name (For Individual Policy Owner)</b>         |  |
| Due to Marriage   | Marriage Certificate issued by Philippine Statistics Authority   |
| Due to Annulment (Change to maiden name)                    | Annulment Decision with Certificate of Finality coming from the Clerk of Court   |
| Due to Discrepancy/For Addition of Other Legal Name/A.K.A.  | Notarized Affidavit of Identity/Discrepancy Birth Certificate issued by Philippine Statistics Authority                                |
| <b>Change of Name (For Company/Business Policy Owner)</b>   |  |
| Due to Amendment of Article of Incorporation or Partnership | Certificate of Filing of Amended Articles of Incorporation or Partnership with SEC<br>Amended Articles of Incorporation or Partnership |
| For Sole Proprietorship                                     | Certificate of Registration with DTI Business Permi  |
| For Cooperative   | Certificate of Registration issued by Cooperative Development Authority (CDA)<br>Amended Articles of Cooperation                       |
| Due to Incorrect Spelling                                   | Articles of Incorporation or Partnership   |

#### Notes:

- For submissions at the Client Service Center, photocopies of requirements may be submitted provided the original copies are presented for verification.
- For submissions through mail or email, additional requirements may still be required.
- For changes due to other reasons, you may contact us at:  
 Email: [sunlink@sunlife.com](mailto:sunlink@sunlife.com)  
 SUNLINK Client Care: (+632)88499888  
 Toll-free (using PLDT Line): 1-800-10-SUNLIFE (7865433) outside Metro Manila  
 8:00 AM - 7:00 PM | Mondays - Fridays  
 \*Calls outside the Philippines may incur international call charges.