

# Prosperity Card Purchase Form

The Sun Life Prosperity Funds, referred to as "Funds," are all managed and distributed by Sun Life Asset Management Company, Inc. (SLAMCI), a member of the Sun Life Financial group of companies.

In this form, *you* and *your* refer to the buyer, while *we*, *us*, *our*, and the *Company* refer to SLAMCI.

**Purpose of the Form:**

This form allows you to purchase a Sun Life Prosperity Card. The Sun Life Prosperity Card is a stored value gift card that may be used to invest in peso-denominated Sun Life Prosperity Funds.

**IMPORTANT INFORMATION ABOUT PROCEDURES FOR PURCHASING A SUN LIFE PROSPERITY CARD:**

Any information provided in this form will be used to allow the Company to identify you and/or verify your information. This is to ensure that we protect you, your application, and your transactions with the Company from being used for money laundering and terrorist financing activities.

**IMPORTANT NOTES:**

You must accomplish and submit the completed form and present your valid ID to select Client Service Centers. For inquiries, please send an email to [sunlink@sunlife.com](mailto:sunlink@sunlife.com).

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 only when completely filled out.

**A General Information**

1. Name of Buyer  Last Name  First Name  Middle Name									
2. Permanent Home Address [No., Street, Village/Subdivision, Barangay, City/Municipality, Province/State, Country (P.O Box is not acceptable)]			3. Zip Code						
4. Contact Number (country code, number, e.g. +639123456789)  +	5. Birthdate Day Month Year (e.g. 08-AUG-2008)      -      -								
6. Citizenship/Nationality	7. Birthplace (City/Province/State and Country)	8. E-mail Address							
9. Name of Employer/Business	10. Nature of Work/Business	11. SSS No., GSIS No. or Philippine Tax Identification No. (TIN)							
12. Source of Funds  <table style="width:100%; border:none;"> <tr> <td style="width:50%;">Investments in other instruments (time deposits, etc.)</td> <td style="width:50%;">Inheritance</td> </tr> <tr> <td>Income / bonus from employment</td> <td>Matured pre-need plan / insurance policy</td> </tr> <tr> <td>Proceeds from sale of assets (real estate, etc.)</td> <td>Other sources, please specify:</td> </tr> </table>				Investments in other instruments (time deposits, etc.)	Inheritance	Income / bonus from employment	Matured pre-need plan / insurance policy	Proceeds from sale of assets (real estate, etc.)	Other sources, please specify:
Investments in other instruments (time deposits, etc.)	Inheritance								
Income / bonus from employment	Matured pre-need plan / insurance policy								
Proceeds from sale of assets (real estate, etc.)	Other sources, please specify:								

**B Card Details**

Denomination	Quantity	Total
Php 5,000		, .
Php 1,000		, .
Other:		, .
Other:		, .
<b>Total</b>		<b>PHP</b> , .

**C Compliance with the Anti-Money Laundering Act (AMLA)**

**Third Party/Beneficial Owner Determination**

A third party/beneficial owner is a person or institution who funds the purchase of the buyer.

13. Is there any Third Party/Beneficial Owner, other than the buyer:		
a) who funds the purchase	Yes	No
b) on whose behalf the purchase is being made	Yes	No

**C Compliance with the Anti-Money Laundering Act (continuation)**

If there is a Third Party/Beneficial Owner, provide details below:

14. Name (Last, First, M.I.) / Business Name			15. Relationship to the Buyer		16. Occupation	
17. Permanent Address [No., Street, Village/Subdivision, Barangay, City/Municipality, Province/State, Country (P.O. Box is not acceptable)]					18. Zip Code	
19. Birthdate (e.g. 08-AUG-2008) Day            Month            Year -            -            -			20. Birthplace (City/Province/State and Country)		21. Philippine Tax Identification No. (TIN)  -            -	
22. Type of Entity (e.g. corporation/partnership, etc.)		23. Nature of Business	24. Date of Incorporation (e.g. 08-AUG-2008) Day            Month            Year -            -            -			25. Country of Incorporation
26. Source of Funds  Investments in other instruments (time deposits, etc.)                      Inheritance Income / bonus from employment    Matured pre-need plan / insurance policy Proceeds from sale of assets (real estate, etc.)                                      Other sources, please specify:						

**D Terms and Conditions**

You understand that the value of the Prosperity Card shall be invested in select Funds subject to completion of requirements and to the approval of the Company.

The card owner shall be responsible for the Prosperity Card. Lost or stolen cards shall not be replaced, and the value of the cards will not be refunded by the Company.

You authorize the Company, its employees, duly authorized representatives, related companies, third party service providers, and vendors to process and share any personal and sensitive information that you have provided or hereinafter may provide to the Company ("Information") in relation to this Application and/or through any of the transactions that you have or may have with the Company with any person or organization to: (i) service my account, (ii) process transactions and enforce the contract, (iii) pursue its legitimate and lawful rights and interests and other interests and other purposes allowed under applicable laws and regulations, including, but not limited to, those relating to data privacy and anti-money laundering; and (iv) to comply with its obligations under applicable laws and regulations. You agree that your Information shall be retained throughout the existence of your SLAMCI 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 or records. You certify that you have read, understood, and agreed with these terms and conditions, including the Company's privacy policy found at <https://apps.sunlife.com.ph/privacy>.

You agree to indemnify and hold free and harmless the Company, its officers, staff, agents and representatives free and harmless from any and all liability that may arise from any acts referred to above. Where a separate waiver is required to provide any information to competent authority or its delegate, you undertake to provide such waiver in a format acceptable to the Company.

You confirm that the funds used to purchase the card are not in any way related to any illegal activity.

You also authorize the Company to conduct a personal investigation and/or verification on you and any records or data you have provided with third parties, including government agencies. A copy of the authorization granted in this document shall be valid as the original.

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

28. Printed Name and Signature of Buyer			29. Date of Signing (e.g. 08-AUG-2008) Day            Month            Year -            -            -	
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**For Office Use Only**

30. Indicate the card numbers of the Prosperity Cards:

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