

**IMPORTANT NOTES & INSTRUCTIONS:**

The accomplished **Annex C1 - Legal Arrangements Form** must be submitted via email to your SLIMTC Relationship Manager or to your Certified UITF Sales Personnel, along with the required documents. All signed documents shall be treated as original copies.

Please write legibly using **CAPITAL LETTERS**. Write **N/A** if the question is not applicable. **Fields with asterisk (\*)** are **ALL MANDATORY**.

FOR SLIMTC USE ONLY		FOR CUSP / RM USE ONLY
<b>Account Number</b> <input type="text"/>	<b>Portfolio Code (For segregated mandates)</b> <input type="text"/>	<b>Advisor Code / RM Code</b> <input type="text"/>

**A LEGAL ARRANGEMENTS**

<b>1. Name of Legal Arrangements*</b> <input type="text"/>			
<b>2. Business/Mailing Address Address* (please completely fill out the fields below)</b> Unit / Floor No., Building Name, Building No., Street, Subdivision/Village, Barangay <input type="text"/> City/Municipality <input type="text"/>			
Province/State	Country	Zip Code	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
<b>3. Trustor / Principal Name*</b> First Name <input type="text"/> Middle Name <input type="text"/> Last Name <input type="text"/> Suffix (e.g., SR., JR., III) <input type="text"/>			
<b>4. Business/Mailing Address Address* (please completely fill out the fields below)</b> Unit / Floor No., Building Name, Building No., Street, Subdivision/Village, Barangay <input type="text"/> City/Municipality <input type="text"/>			
Province/State	Country	Zip Code	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
<b>5. Valid ID Presented*</b> <input type="text"/>	<b>6. Valid ID Number*</b> <input type="text"/>	<b>7. Valid ID Validity* (mm-dd-yyyy)</b> <input type="text"/>	
<b>8. Issuing Country of Valid ID*</b> <input type="text"/>	<b>9. Office Phone Number*</b> (e.g. +632XXXXXXX) <input type="text"/>	<b>10. Office Mobile Phone Number*</b> (e.g. 9XXXXXXXXX) <input type="text"/>	
<b>11. Office Email Address*</b> <input type="text"/>			

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For inquiries, feedback, requests, or complaint, you may contact us through (02) 8849 9888 or email us at [SLIMTC.Communications.Notice@sunlife.com](mailto:SLIMTC.Communications.Notice@sunlife.com)  
 Sun Life Investment Management and Trust Corporation (SLIMTC) is regulated by the Bangko Sentral ng Pilipinas (BSP). BSP Telephone Number (02) 8708 7087; Email: [consumeraffairs@bsp.gov.ph](mailto:consumeraffairs@bsp.gov.ph); BSP Webchat: <http://www.bsp.gov.ph>