

# Client Information Update Form Individual

In this form, **you** and **your** refer to the client/s or the company's authorized signatory/ies, while **we, us, our** and the **Company** refer to Sun Life Investment Management and Trust Corporation (SLIMTC), which is a member of the Sun Life group of companies.

## IMPORTANT NOTES & INSTRUCTIONS:

The accomplished and signed **Client Information Update Form - Individual**, 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** and write **N/A** if question/item is not applicable. Mark the box(es) with an "✓" to indicate your choice(s) and **sign the form** only when completely filled out.

### FOR SLIMTC USE ONLY

#### Client Code

### A GENERAL INFORMATION

#### IMPORTANT NOTE

Any updates requested in this form will also be reflected in all of your accounts.

#### 1. Client Name (First Name, Middle Name, Last Name)

#### 2. Date Accomplished (mm-dd-yyyy)

### B NAME CHANGE REQUEST

#### 3. Change Name

##### FROM

##### TO

First Name

Middle Name

Last Name

Suffix (e.g., SR., JR., III)

#### 4. Reason for Change

Marriage

Annulment

For Correction

Other (Please specify)

#### 5. Change in Civil Status

Single

Married

Common Law

Legally separated

Divorced

Annulled

Widowed

N/A

#### 6. Has there been any change in your citizenship(s), nationality(-ies) or country of legal residence?

Yes, I am a now a citizen/national and a legal resident of (specify country)

Yes, I am a now a citizen/national of (specify country).

but I legally reside in (specify country).

None

### C CONTACT INFORMATION CHANGE REQUEST

#### 7. New Phone Number (e.g. +632XXXXXXX)

#### 8. New Mobile Phone Number (e.g. 9XXXXXXXX)

#### 9. New Email Address

#### 10. New Permanent Address (please completely fill out the fields below)

Unit / Floor No., Building Name, Building No., Street, Subdivision/Village, Barangay

City/Municipality

Province/State

Country

Zip Code

**11. New Present Address** (please completely fill out the fields below)

Same as permanent address

Unit / Floor No., Building Name, Building No., Street, Subdivision/Village, Barangay

City/Municipality

Province/State

Country

Zip Code

**12. New Preferred Mailing Address**

Permanent address  Present address

**D BUSINESS/EMPLOYER CHANGE REQUEST**

**13. New Employment Type**

Self-employed  Public Employee  Private Employee  Retired  Other (Please specify)

**14. New Business/Employer Name**

**15. New Position/Occupation**

**16. New Business/Employer Address** (please completely fill out the fields below)

Unit / Floor No., Building Name, Building No., Street, Subdivision/Village, Barangay

City/Municipality

Province/State

Country

Zip Code

**17. New Nature of Business / Employment**

Academe / Education

Accounting / Accountant

Agriculture / Forestry / Fishing

**Financial Services** (please choose one)

Arts / Entertainment

Charity/Social Work

Consultancy

Bank

Gaming - Gambling

Government

Health

Virtual / Digital Currency Provider

Hospitality Industry

Information and Communication

Legal / Lawyer

Money Service Bureaus / Remittance / Foreign Exchange

Manufacturing

Mining

Military Defense / Security/ Energy / Utilities

Wealth Management / Asset Management

Real Estate

Retail Trade

Science / Research

Insurance

Transportation and Storage

Wholesale Trade

Non-Bank Financial Services

Others (please specify)

**18. New Estimated Regular Income** (in Philippine Peso)

Under 10 M  10 M to 50M  51M to 100M  Over 100 M

**19. I am now an Officer or Director of a listed company.**

Yes (Please indicate the company name)  No

**20. I am now a relative or associated to a person currently / formerly holding a position in any branch of the Philippine or foreign government or an international organization.**

Yes (Please indicate the company name)  No

**E ACKNOWLEDGEMENT**

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

- a. All information provided in this form are true, correct, and complete. SLIMTC shall update your records based on the information you provided.
- b. You agree to update SLIMTC within 30 calendar days of any change in the information supplied in this form, including but not limited to your citizenship(s)/nationality(ies), and tax status. You also agree to submit documents requested by SLIMTC to maintain and update your account.
- c. You acknowledge the Company's statutory responsibility to provide your information, including but not limited to your local or foreign tax status, to the appropriate authority.
- d. You agree that SLIMTC shall process your personal data 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. SLIMTC may disclose your personal data to its affiliates, service providers, and other third parties for processing consistent with the foregoing purposes, who shall be bound by contractual or other reasonable means to protect your personal data.
- e. 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 [privacy.slimtc@sunlife.com](mailto:privacy.slimtc@sunlife.com).

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 in relation to the processing of this request.

Client Name	Signature
Place of signing <i>(City/Municipality, Country)</i>	Date Signed <i>(e.g. mm-dd-yyyy)</i>

**LIST OF REQUIREMENTS**

<b>Standard Requirements</b>	Accomplished and signed Client Information Update Form - Individual and Valid ID of the Account Holders
<b>Change of Name</b>	
Due to Marriage	Marriage Certificate issued by the Philippine Statistics Authority (PSA)
Due to Annulment (Change to maiden name):	Annulment Decision with Certificate of Finality coming from the Clerk of Court
Due to Name Discrepancy, Addition of Other Legal Name, or A.K.A.	Notarized Affidavit of Identity/Discrepancy Birth Certificate issued by Philippine Statistics Authority
Change of Address	Present a Valid ID with the new address. If not available, submit Proof of Residence / Billing Address

**FOR SLIMTC USE ONLY**

**Signature Verified by**

Printed Name	Signature	Date <i>(e.g. mm-dd-yyyy)</i>

**Approved by**

Printed Name	Signature	Date <i>(e.g. mm-dd-yyyy)</i>