

Maturity Benefit Claim Requirements



Purpose of this checklist:

This checklist serves as a guide when claiming for maturity benefits.

IMPORTANT REMINDERS

Please take note of the following:

- Submit certified true copies only.
 - ☑ Photocopies, except for IDs, are not acceptable.
 - ☑ Photocopies of IDs may be submitted provided the original copies are presented for verification.
- Documents submitted to Sun Life of Canada (Philippines), Inc., will not be returned.
- Always attach a photocopy of the Claimant's valid ID (any government-issued ID with photo and signature) with the basic claim requirements.
- We may ask for additional documents after reviewing the requirements you submitted.

A Basic Claim Requirements

- ☐ **Claimant's Statement** [form provided by SLOCPI] to be completed by designated primary beneficiary (-ies) or by authorized signatory, if beneficiary is a company

Special Instruction: One Claimant's Statement per beneficiary

B Conditional Requirements (Submit appropriate requirements as indicated below.)

If beneficiary is the spouse

- ☐ **Marriage Certificate** issued by the Philippine Statistics Authority (original)

If beneficiary is a minor (below 18 years old)

- ☐ **Birth Certificate** of the minor issued by the Philippine Statistics Authority (original)
- ☐ **Notarized Affidavit of Guardianship** [form provided by SLOCPI] if parent or other party is claiming on behalf of the minor

Additional documents required if the approved claim exceeds PHP500,000.00:

- ☐ **Guardian's Bond** approved by the court including the Summary of the Proceedings or the Petition if parent is claiming on behalf of the minor (submit only upon approval of claim)
- ☐ **Letters of Guardianship** approved by the court including the Summary of the Proceedings or the Petition if party other than parent is claiming on behalf of the minor (submit only upon approval of claim)

If designated beneficiary is a creditor

- ☐ **Statement of Account** if loan has not been paid in full as of date of maturity
- ☐ **Proof of Settlement of Loan** if loan has been paid in full as of date of maturity

If beneficiary is a corporation

- ☐ **Corporate Secretary's Certificate** indicating the name(-s), scope of authority and specimen signature(-s) of the person(-s) authorized by the company to sign the claim requirements
- ☐ **One (1) valid ID** (any government-issued ID with photo and signature) per authorized signatory
- ☐ Latest **General Information Sheet (GIS)** duly filed with the Securities and Exchange Commission (SEC)



If beneficiary is a corporation, or an individual who is a U.S. Person or tax resident (*including a green card holder and dual citizen*), or who has a U.S. Address or U.S. phone number

- ☐ **FATCA Declaration Form** [form provided by SLOCPI]
- ☐ Duly accomplished **W-8BEN** or **W-9** [form may be downloaded from the IRS website - www.irs.gov/forms-instructions]

For inquiries and concerns, please contact us at any of the following:

Email: sunlink@sunlife.com

Client Care: (+632) 8849-9888*

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.

