

ACTIVATION

Begin your brighter journey with the Sun RISE Portal!

1

You will receive an e-mail with the subject "Sun Rise Portal - Account Activation". Click on the activation link. You will be navigated into the Sun RISE Portal activation page.

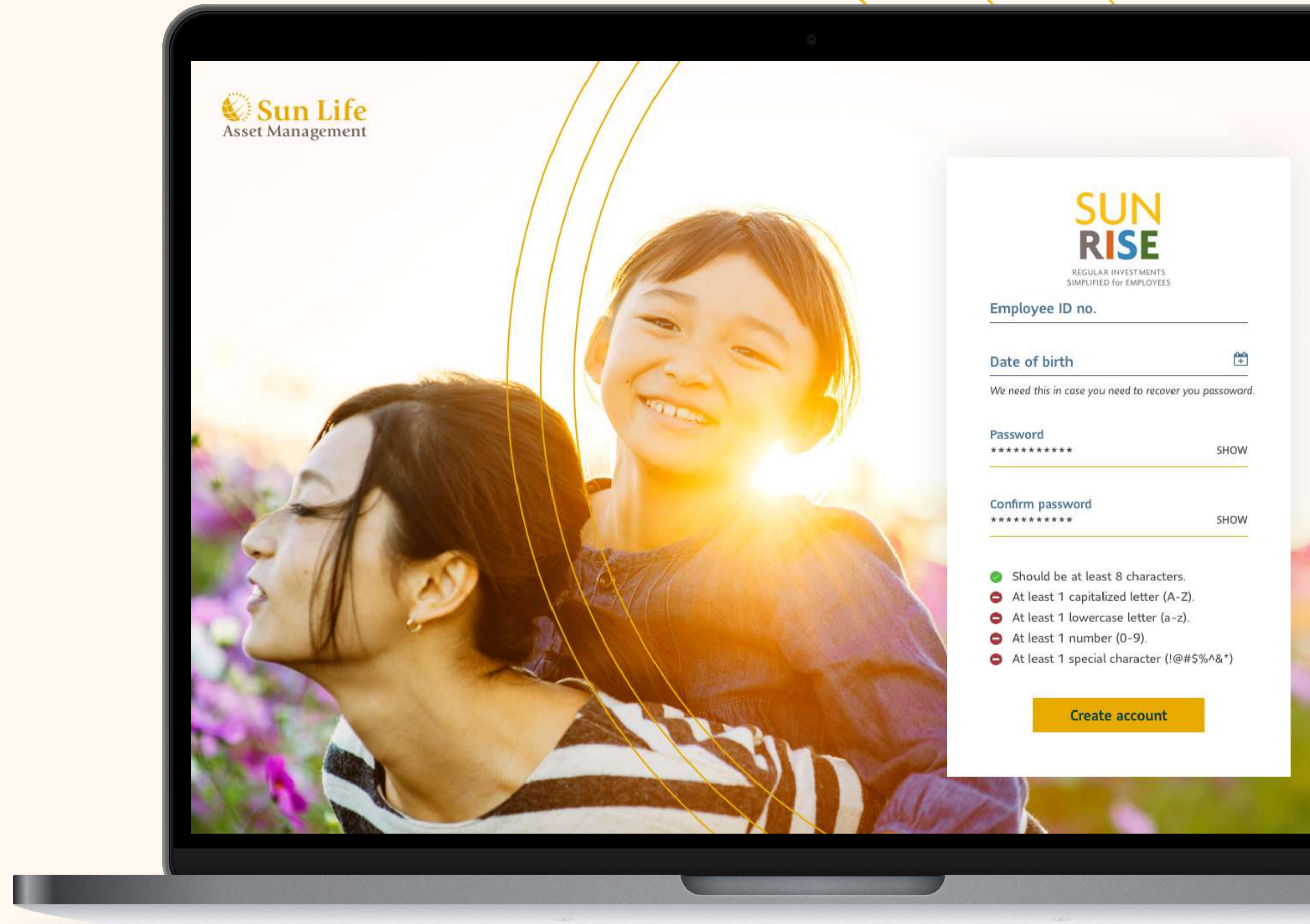
2

Once in the Sun RISE Portal, enter your date of birth and employee ID, nominate a password, and click on "Create account".

Note: The password should be at least eight (8) characters long, and must contain at least one capitalized letter, one lowercase letter, one number, and one special character.

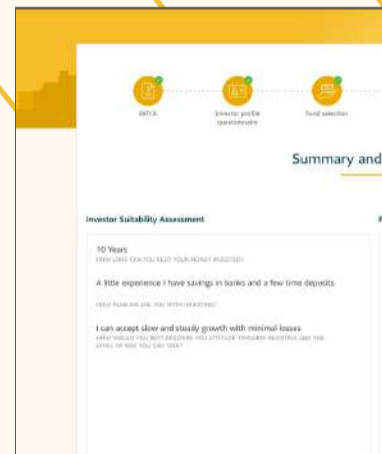
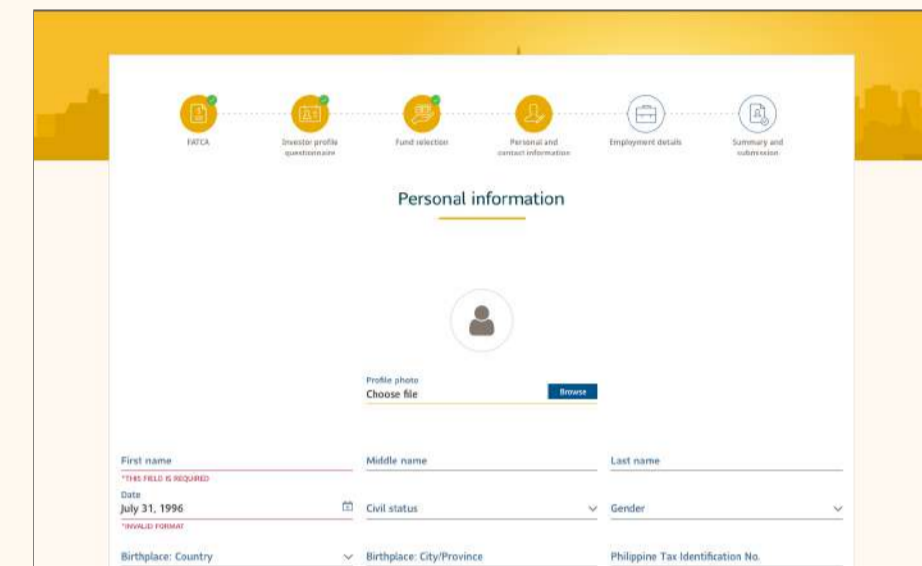
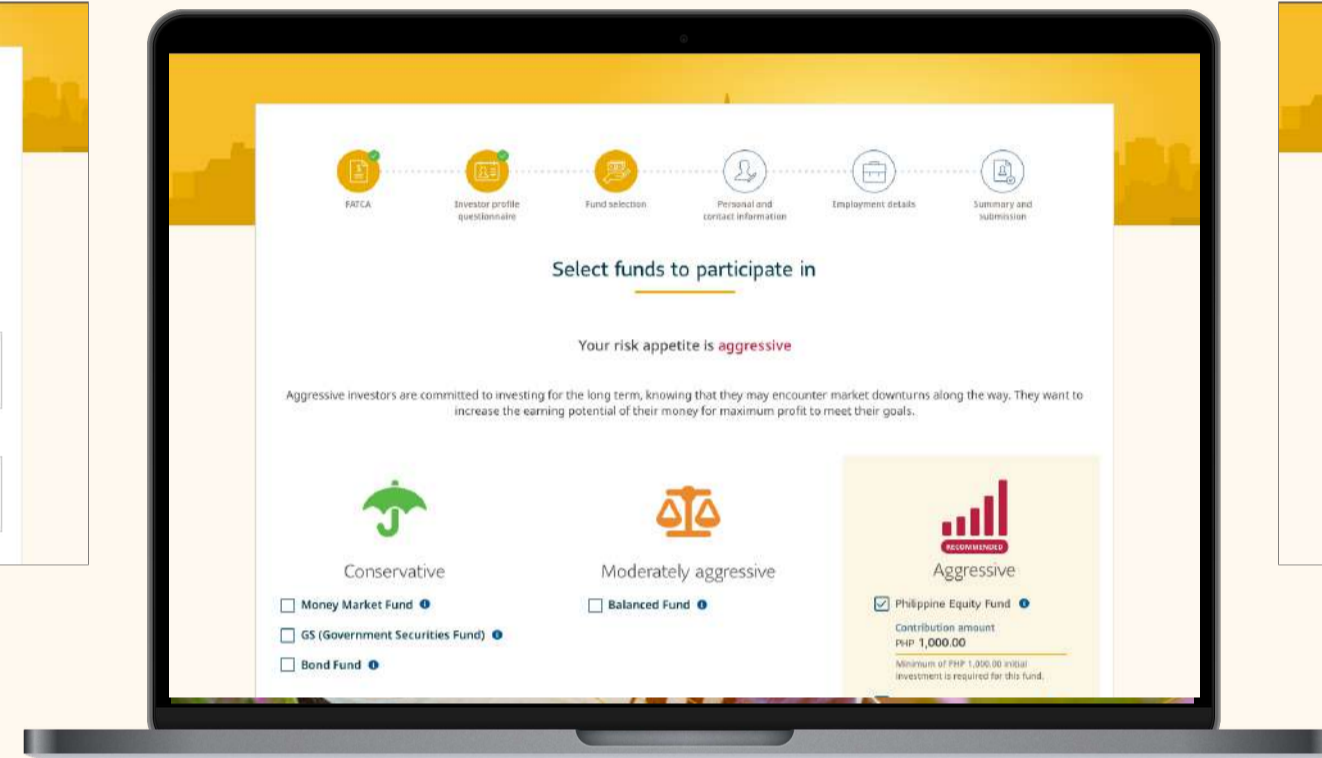
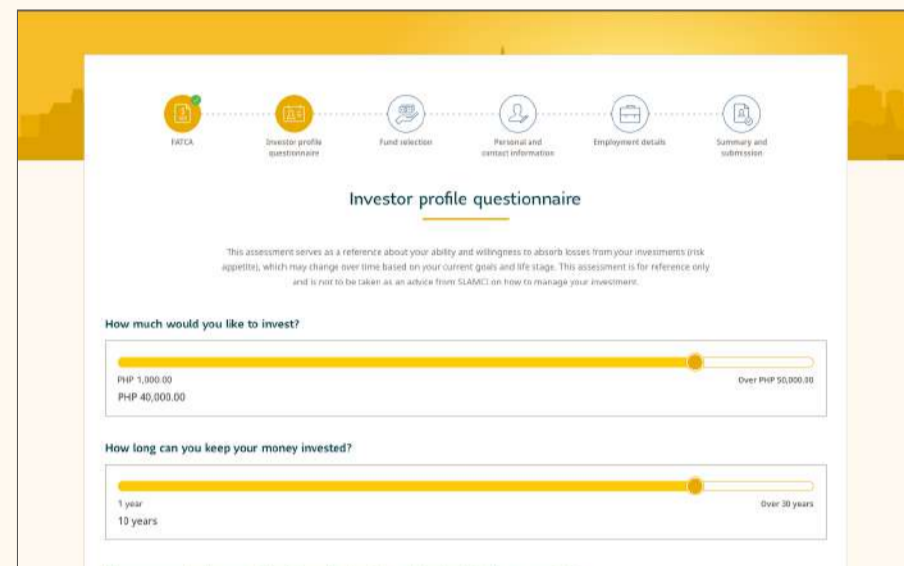
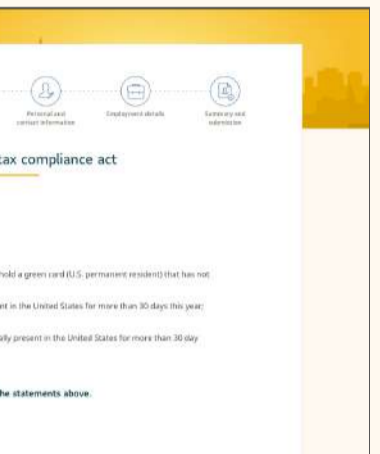
3

You will be asked to log in for the first time. Enter the email address and password you nominated previously. A one-time PIN (six-digit code) will be sent to your registered mobile number. Enter that when prompted and then proceed.



REGISTRATION

To proceed with your enrollment in Sun RISE, do take a minute to accomplish the registration requirements.



1 Once the Terms and Conditions are displayed, tick the two checkboxes to confirm your attendance to the Sun RISE orientation, and to agree with the terms and conditions of the program.

2 You will need to fill up 5 sections of the registration forms. These are:

- FATCA (Foreign account tax compliance act)
- Investor profile questionnaire
- Fund selection
- Personal and contact information (must upload profile picture)
- Employment details (must upload government ID)

Be mindful of the required fields.

3 You will be redirected to the Summary page. "Review your details and click "Submit.""

4 Your part in the enrollment is now finished. Please wait for a confirmation email stating that your account is ready and active. You may log in to the portal after that.

DASHBOARD (Multiple fund)

Once logged in the Sun RISE Portal, there are many activities you can engage in that pertain to your investments.

1

Here, you can request the following tasks:

- Redeem
- Adjust monthly investments
- Convert to individual account

3

Shows your total accumulated subscriptions.

5

This shows your current monthly contribution amount.

6

This shows your total current number of shares accumulated.

7

Notification area if there is a new fund available. Here, you may choose to invest in the said fund(s).

8

This shows your employer contribution amount.

NOTE: Monthly employer contribution is optional depending if your employer availed this option.

The screenshot displays the Sun Life Asset Management dashboard for user Tyler Hopkins (ID: 03181919). The dashboard is divided into two main sections for fund investments:

- Philippine Equity Fund:**
 - Current value: PHP 21,819.19 (labeled 2)
 - Total investments: PHP 20,000.00 (labeled 3)
 - NAVPS as of today: 4.2920 (labeled 4)
 - Monthly investment: PHP 2,500.00 (labeled 5)
 - No. of EE shares: 4,660 (labeled 6)
- Philippine Stock Index Fund:**
 - Current value: PHP 2,505.50 (labeled 7)
 - Total investments: PHP 2,500.00 (labeled 8)
 - No. of shares: 2,450
 - NAVPS as of today: 1.0202
 - Monthly investment: PHP 2,500.00
 - Company contribution: PHP 2,505.00 (labeled 8)

A notification banner at the top indicates "New funds available for investment" with "Dismiss" and "Add now" options.

2

This shows the current value of your total investment as of today (NAVPS X No. of shares)

4

The NAVPS (Net Asset Value Per Share) value as of date.

*For newly enrolled members, the message that will display in the home page shall be, "Awaiting for subscription for new member, please contact your HR representative for inquiries."

BANNER AREA

Manage your activities with ease.

1 Find here a list of all your transactions in the last 180 days.

2 Will show a page where you can suspend your monthly contributions, and resume them after. Here you may also convert your Sun RISE into Individual account in case you decide to leave your company.

3 Here you may change details such as your email address, contact number, profile photo, and nominated password.

The screenshot shows the Sun Life Asset Management dashboard for user Tyler Hopkins (ID: 03181919). The dashboard includes a navigation menu with 'HOME', 'TRANSACTION HISTORY', 'SERVICE REQUESTS', 'PROFILE', and 'LOGOUT'. A notification bar at the top states 'New funds available for investment.' Below this, there are two fund performance cards: 'Philippine Equity Fund' and 'Philippine Stock Index Fund'. Three callouts are present: 1. 'Investment transaction history' table; 2. 'Service requests' page with 'Convert to individual account' and 'Suspend a...' options; 3. 'Profile' page with 'Email and contact no.' and 'Profile photo' sections.

Date	Fund type	NAVPS
Mar 12, 2018	Philippine Equity Fund	0.9033
Feb 28, 2018	Bond Fund	0.91203
Mar 12, 2018	Bond Fund	0.91203