



# Sun Life Prosperity Peso Starter Fund, Inc.

*(Formerly Sun Life Prosperity Money Market Fund, Inc.)*

## Frequently Asked Questions

Version 2, Revised February 2022



# Contents



## Background

*What you need to know about the change in name*



## Transactions

*Important reminders to note when transacting using the new name*



## Programs

*Learn how the change will impact our programs.*



## Getting in Touch

*Connect with us through your preferred means.*



# Background

What you need to know about  
the change in name

[BACK TO HOME](#)



## What is the reason for changing the name of the Fund?

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Sun Life Asset Management Company, Inc. (SLAMCI) aims to strengthen the positioning of the **Sun Life Prosperity Money Market Fund, Inc.** (“Money Market Fund”) as an entry-level product or “starter” for clients who are new to investing, hence the new name: **Sun Life Prosperity Peso Starter Fund** (“Peso Starter Fund”).

The Fund will still aim to provide **potentially higher returns than traditional bank deposit products.**

It remains ideal for investors who are looking for relatively **safe and liquid investments** where they can park their money and potentially earn modest returns.



[BACK TO HOME](#)



# Are there any material changes in the Fund's features?

Yes, there are only two:

- a. Fund Name
- b. Investment Objective as written in the Fund's Prospectus, seen as follows:

Previous Investment Objective	Amended Investment Objective
The Fund aims to generate income in Philippine Pesos consistent with prudent management of the Fund's assets. The investment policy is to invest in Peso-denominated fixed income and other related securities of the Philippine Government and commercial papers issued by corporations within the Philippines, certificate of deposits, and other Peso-denominated short-term instruments.	The Fund aims to generate income consistent with prudent management of the Fund's assets. The investment policy is to invest in fixed income and other related securities, and commercial papers issued by corporations, certificate of deposits, and other short-term instruments. The Fund may invest in domestic or foreign securities, denominated in any currency, but shall not bear any foreign exchange risk.

The Fund's Investment Objective was amended to expand its potential investment outlets and better position it for growth opportunities.

The **Prospectus** is a material that provides a comprehensive description about an investment. Each of our mutual funds is supported by a Prospectus to help prospective investors make informed decisions. Should you need assistance on this matter, please send us an e-mail at [slamc@sunlife.com](mailto:slamc@sunlife.com) or contact your Sun Life Mutual Fund Advisor.

[BACK TO HOME](#)



# Are there any material changes in the Fund's features?

The following features of the Fund remain unchanged:

<b>FUND FEATURES: SUN LIFE PROSPERITY PESO STARTER FUND</b>	
<b>Fund Structure</b>	Mutual Fund (Shares)
<b>Fund Classification</b>	Money Market Fund
<b>Client Suitability</b>	Conservative
<b>Minimum Initial Investment</b>	PHP 100
<b>Minimum Additional Investment</b>	PHP 100
<b>Minimum Holding Period</b>	7 calendar days
<b>Early Redemption Fee</b>	0.25%
<b>Redemption Settlement</b>	Transaction Date + 1 day
<b>Management and Distribution Fee</b>	0.25% per annum

[BACK TO HOME](#)



## Is there any adverse impact on the Fund's pricing and management?

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None. Your shares and investments **will not be affected** by these changes.



## Do I need to redeem and re-subscribe my existing Money Market Fund shares to the Peso Starter Fund?

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No, our systems will automatically rename your holdings to be recognized under Peso Starter Fund.



[BACK TO HOME](#)



# Will the new Fund name be reflected in digital platforms, marketing and product materials, future client communications, and documents?

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Yes. Effective **September 1, 2021 (Wednesday)**, the Money Market Fund will be renamed to Peso Starter Fund in digital platforms such as the My Sun Life Client Portal, Sun Life PH Mobile App, Sun Life Website ([www.sunlifefunds.com](http://www.sunlifefunds.com)), and Advisor Home Office (AHO) for Sun Life advisors.

**Marketing and product materials** (e.g., fund fact sheets, forms, and Fund Prospectus) will bear the new name. Similarly, **future communications** and **client documents** will refer to Money Market Fund as Peso Starter Fund.



[BACK TO HOME](#)





## Does this mean that the *Sun Life Prosperity Peso Starter Fund, Inc.* is now the peso-denominated counterpart of the *Sun Life Prosperity Dollar Starter Fund, Inc.*?

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No. While both are conservative funds that seek to provide higher yields than deposits, the two are of different fund types.

- The *Sun Life Prosperity Peso Starter Fund, Inc.* is classified as a **money market fund** that is mainly invested in short-term deposits and debt instruments and has an average portfolio duration of **one (1) year or less**.

- The *Sun Life Prosperity Dollar Starter Fund, Inc.* is classified as a **short-term fixed income fund** that invests in longer-term debt instruments and has an average portfolio duration which **may exceed one (1) year**.



[BACK TO HOME](#)

# Transactions

Important reminders to note when transacting using the new name

[BACK TO HOME](#)



## Is there a strict implementation date on the use of the new name?

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Yes. By **March 1, 2022 (Tuesday)**, SLAMCI will implement the strict use of the new name in client forms and document submissions.



## If I indicate Money Market Fund instead of Peso Starter Fund in documents and forms, will they still be accepted?

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Yes, but only up to **March 1, 2022**. Nevertheless, we encourage you to use the new name starting **September 1, 2021**.



[BACK TO HOME](#)



**For corporate accounts, is the submission of a revised *Board Resolution* or *Secretary's Certificate* bearing the new name required, in case we previously specified *Sun Life Prosperity Money Market Fund, Inc.* in the existing document?**

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No. Any **existing** Board Resolution or Secretary's Certificate that mentions the former name ("Sun Life Prosperity Money Market Fund, Inc.") **shall still be honored**. However, **new submissions** will require the new name ("Sun Life Prosperity Peso Starter Fund, Inc.").



[BACK TO HOME](#)



# What is the impact of the name change in making initial or subsequent investments?

*This will depend on the channel used in making the investment, as follows:*

## Physical and Fillable Forms

When submitting physical forms to Client Service Centers (CSCs) or sending fillable forms via e-mail, please write or tick the new name.



**Note:** The name change will have no impact on investments made via **local bank deposit** (fund transfer or validated deposit slips). Note that this applies to local bank deposits to SLAMCI accounts only and not to Bills Payment. This is because the payee name of our bank accounts is SLAMCI, and not a specific fund.

[BACK TO HOME](#)



# What is the impact of the name change in making initial or subsequent investments?

This will depend on the channel used in making the investment, as follows:

## Client Portal and Mobile App

Effective **September 1, 2021**, your **My Sun Life Client Portal** and the **Sun Life PH Mobile App** will automatically reflect the new name. Make sure to select *Sun Life Prosperity Peso Starter Fund* in the drop-downs.



**Note:** The name change will have no impact on investments made via **local bank deposit** (fund transfer or validated deposit slips). Note that this applies to local bank deposits to SLAMCI accounts only and not to Bills Payment. This is because the payee name of our bank accounts is SLAMCI, and not a specific fund.

BACK TO HOME

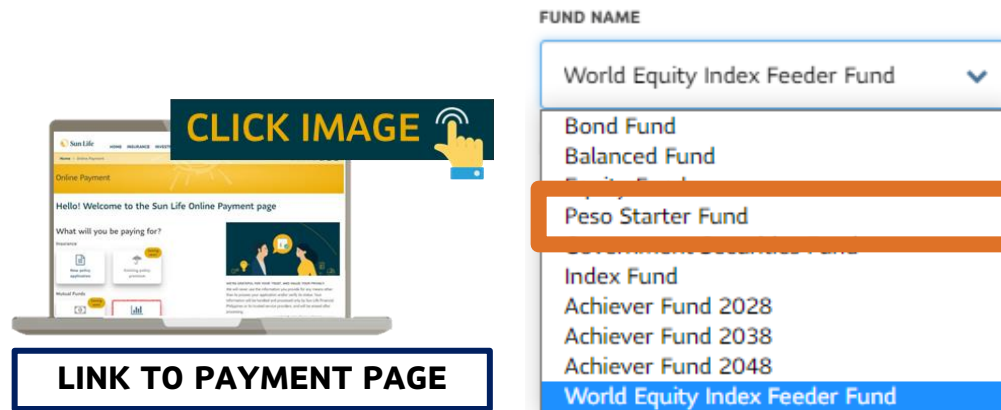


# What is the impact of the name change in making initial or subsequent investments?

This will depend on the channel used in making the investment, as follows:

## Online Payment Page

**Peso Starter Fund** should appear in the drop-down menu. Should this be unavailable, you may select the fund's former name, **Money Market Fund**, instead.



[BACK TO HOME](#)

# Programs

Learn how the change will impact our programs.



Bills Payment



Auto-Invest



Prosperity Card



SLAMCI Online



Sun RISE



Sun Synergy

[BACK TO HOME](#)



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# Bills Payment

Existing clients can make additional investments in peso-denominated Sun Life Prosperity Funds through the following bank partners: BDO, BPI, and Metrobank.

BACK TO HOME



**I already have the Money Market Fund as biller in my bank's online and/or mobile banking platform. Do I need to re-enroll or manually update the biller name?**

No. On **September 1, 2021**, the new Fund name will be automatically reflected in the online and mobile banking platforms of our partner banks **BDO**, **BPI**, and **Metrobank**. See below for the new names:

Mutual Fund Name	Company/Biller Name		
	BDO and Metrobank	BPI	
		Long Name	Short Name
Sun Life Prosperity Peso Starter Fund	SLAMCI Peso Starter	SLMPCS	



If I issue a check as payment for an over-the-counter Bills Payment transaction, will bank partners accept the check if I wrote “*Sun Life Prosperity Money Market Fund, Inc.*” as payee?

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Yes, only up to **March 1, 2022**. Please start using the new Fund name (*Sun Life Prosperity Peso Starter Fund, Inc.*) starting **September 1, 2021**.



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## Auto-Invest

Existing clients can add monthly or quarterly investments to their peso-denominated Sun Life Prosperity Funds automatically from their bank accounts. Partner banks include BDO, BPI, Metrobank, and Security Bank.

BACK TO HOME



# I already have an existing Auto-Invest enrollment for my Money Market Fund investment. Do I need to update my enrollment?

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No. The change will be made internally and the renaming will not affect your auto-debit arrangement with any of our partner banks **BDO**, **BPI**, **Metrobank**, and **Security Bank**.

[BACK TO HOME](#)

## Auto-Invest



# Do I need to select/write the new name when filling out the bank's Auto-Debit Arrangement (ADA) form?

**For BDO and Security Bank:** While the old forms are available, you may tick the check box for **Money Market Fund** and the bank shall still accept your ADA forms. Once the new form is available in these banks, please tick the check box for **Peso Starter Fund**.

**BDO** **CLICK IMAGE**

Read the Terms and Conditions at the back of this form. Complete and

**Customer Information**

Account Name  Individual  Corporate

Account Number<sup>1</sup>

**Enrollment / Cancellation Information**

ADS (Please Tick Here)	Fund Name
<input type="checkbox"/>	Sun Life of Canada Prosperity Philippine Equity Fund, Inc.
<input type="checkbox"/>	Sun Life Prosperity Dynamic Fund, Inc.
<input type="checkbox"/>	Sun Life of Canada Prosperity Bond Fund, Inc.
<input type="checkbox"/>	Sun Life Prosperity GS Fund, Inc.
<input type="checkbox"/>	Sun Life Prosperity Money Market Fund, Inc.

**BDO ADA FORM**

**SECURITY BANK** **CLICK IMAGE**

**SECURITY DIGIBANKER – AutoDebit Collections Manager (ADCM)**  
**Enrollment Form**

Branch of Account: \_\_\_\_\_

Depositor Name: \_\_\_\_\_ Date: \_\_\_\_\_

Ref. No. (Mutual Fund Account No.): \_\_\_\_\_

Account No. to be Debited: \_\_\_\_\_

Company/Institution/Beneficiary Name (Complete name of Fund): \_\_\_\_\_

Product Name (Please choose 1 only):

<input type="checkbox"/> Equity	<input type="checkbox"/> GS Fund	<input type="checkbox"/> Other
<input type="checkbox"/> Prosperity Balanced Fund	<input checked="" type="checkbox"/> Money Market Fund	
<input type="checkbox"/> Bond Fund	<input type="checkbox"/> Index Fund	

**SECURITY BANK ADA FORM**

[BACK TO HOME](#)



## Do I need to select/write the new name when filling out the bank's Auto-Debit Arrangement (ADA) form?


**For BPI and Metrobank:** Please **write** the new Fund name already (*Sun Life Prosperity Peso Starter Fund, Inc.*) when filling out their ADA forms.

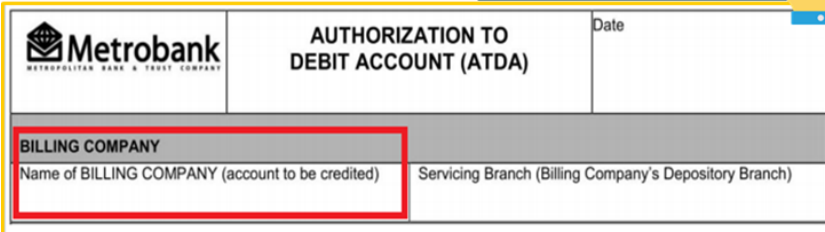
**CLICK IMAGE** 



The image shows the BPI ExpressLink Automatic Debit Arrangement form. It includes fields for Customer's Name, Date, Customer Deposit Account to be Debited (BPI Accounts only), Company/Merchant, and Customer Reference Number. A red box highlights the Company/Merchant field. A note at the bottom states: '\* Please see Customer Reference No. indicated on proof of billing, policy contract, or customer introductory letter to branch.'

**BPI ADA FORM**

**CLICK IMAGE** 



The image shows the Metrobank Authorization to Debit Account (ATDA) form. It includes fields for Date, BILLING COMPANY, Name of BILLING COMPANY (account to be credited), and Servicing Branch (Billing Company's Depository Branch). A red box highlights the BILLING COMPANY section.

**METROBANK ADA FORM**

SLAMCI's Auto-Invest Enrollment Form will also reflect the new Fund name and shall be updated accordingly in the [website](#).

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# Prosperity Card

New and existing clients may invest in any of the peso-denominated mutual funds using this investment gift card worth PHP 1,000 or PHP 5,000.

[BACK TO HOME](#)





## How does the name change impact our use of the Prosperity Card?

There is **no impact** on the process of using the Prosperity Card. Just make sure to indicate or select the new Fund name.



When investing in the Peso Starter Fund via **physical or fillable forms**, tick “Others” under Payment Details and indicate “Prosperity Card” along with the card number.

65. Fund Name ( 1 )	Sales Load:	<input checked="" type="checkbox"/> Front-End Load*	<input type="checkbox"/> Back-End Load**	<input type="checkbox"/> Others
PESO STARTER FUND	Amount Paid:	<input checked="" type="checkbox"/> PHP	<input type="checkbox"/> USD	1 0 0 0 0 0
	Amount in Words:	ONE THOUSAND PESOS ONLY		
Payment Details		<input type="checkbox"/> Cash		
<input type="checkbox"/> Check (To be processed only upon receipt of cleared funds. To apply for the waived clearing privilege, fill out the Request for Waived Clearing by MF Representative form.)		<input type="checkbox"/> Direct Deposit to SLAMCI Bank Account		
Check No.:		Name of the Bank:		
Drawee Bank:		<input type="checkbox"/> Transfer from Sun Life Insurance Policy / Plan Agreement		
		<input type="checkbox"/> Telegraphic Transfer		
		<input checked="" type="checkbox"/> Others PROSPERITY CARD - 2019 PYF3 0000 0001		



## How does the name change impact our use of the Prosperity Card?

There is **no impact** on the process of using the Prosperity Card. Just make sure to indicate or select the new Fund name.



When investing in the Peso Starter Fund via the **Client Portal** or **Mobile App\*** using Sun Life Prosperity Card, simply choose the Fund's new name in drop-downs.

**CLIENT PORTAL**

Bank Prosperity Card

Card Number  
2019-PYF3-0000-0001

Security Code  
12345678

Sun Life Prosperity Peso Starter Fund

---Select one---  
Sun Life Prosperity Bond Fund  
Sun Life Prosperity Balanced Fund  
Sun Life Prosperity Philippine Equity Fund  
Sun Life Prosperity Peso Starter Fund  
Sun Life Prosperity Government Securities Fund  
Sun Life Prosperity Index Fund

**MOBILE APP**

< Add fund

FUND  
Peso Starter Fund (01234567CF01)

TYPE OF PAYMENT  
Prosperity card

CARD NUMBER  
2019PY53000000001

SECURITY CODE  
1234567

1

Under **Add Fund**, select **Prosperity Card** as mode of payment.

*\* Investing in new funds cannot be done in the Mobile App at the moment.*

2

Input card details and make sure to select the new name in drop-down lists.

3

Complete the form and submit.

[BACK TO HOME](#)

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## SLAMCI Online (eKYC)

SLAMCI Online's Electronic Know-Your-Client or eKYC feature enables *new individual clients* to apply for and open a peso-denominated mutual fund investment account online.

BACK TO HOME



# Does the name change have any impact on the online mutual fund application process?

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None. By **September 1, 2021**, the new name will automatically reflect in [sunlifefunds.com](https://sunlifefunds.com) and in the online application platform.



ONLINE MUTUAL FUND APPLICATION PLATFORM

BACK TO HOME

# Sun RISE

Workplace savings and group investment program that allows member-employees to invest in peso-denominated Sun Life Prosperity Funds for as low as PHP 300.

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SUN  
RISE

LEARN MORE

CLICK IMAGE



SUN  
SYNERGY  
[RECHARGED]

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# Sun Synergy

Automatic premium payment facility for two complementary products: *mutual funds* for growth in investments, and *insurance policies* for protection.

BACK TO HOME

## Sun RISE



### Does the name change have any impact on the program?

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None. The new name shall be reflected in the Sun RISE Portal by **September 1, 2021**.

## Sun Synergy



### Does the name change have any impact on the program?

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None. The name change has **no impact** on the program and your existing enrollments.

[BACK TO HOME](#)

# Connect with SLAMCI

For questions and concerns, please reach out to us through your preferred means:



## Your Sun Life Financial Advisor

Get in touch with your financial advisor or find one [here](#).



## Client Service Centers

Find the branch nearest you [here](#).



## Client Care

Send us an e-mail at [sunlink@sunlife.com](mailto:sunlink@sunlife.com) or give us a call at 8-849-9888.

[BACK TO HOME](#)



**Sun Life**  
Asset Management